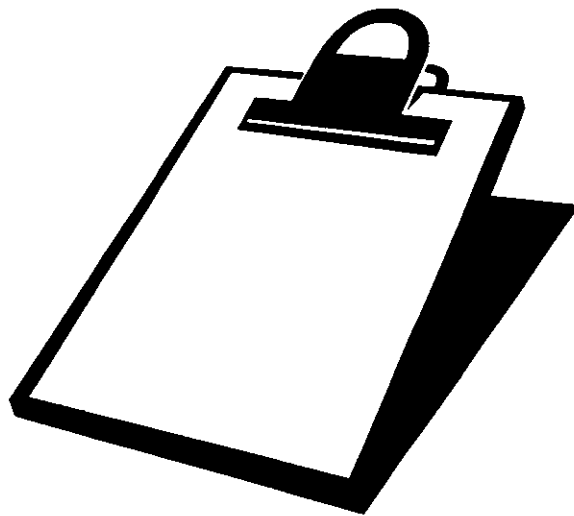


Personal Assistance Training Pack



Gateshead Personal Assistance
Project

Written by Ross Cowan and Stuart Bracking
with assistance from Bob Watson

Published in January 2000 by :

Gateshead Personal Assistance Project

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John Haswell House
8/9 Gladstone Terrace
Gateshead
NE8 4DY



0191 477 3558 (voice)
0191 478 4082 (minicom VII)
0191 477 1260 (fax)
gpap@disabilitygateshead.org.uk
(e-mail)

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- Introduction -

The Gateshead Personal Assistance Project (GPAP) started in April 1997 and was funded for 3 years by the National Lottery Charities Board. The Project was run by the Gateshead Council on Disability, a long established voluntary organisation and charity run by, and promoting the interests of, Disabled people in Gateshead.

GPAP provided support, training and advice to Disabled people and to organisations in Gateshead on anything to do with Personal Assistance and Independent Living.

A major part of its role was the production of 'How to ...' guides aimed at personal assistance users and the running of training sessions, mainly for Disabled people.

The Project was always committed to sharing its knowledge and experience as widely as possible. Not because 'we know best' but perhaps to save people from 'reinventing the wheel'.

GPAP's publications were made available free of charge anywhere in the UK and were put on the world wide web to make them freely accessible to anyone in the world with access to the internet.

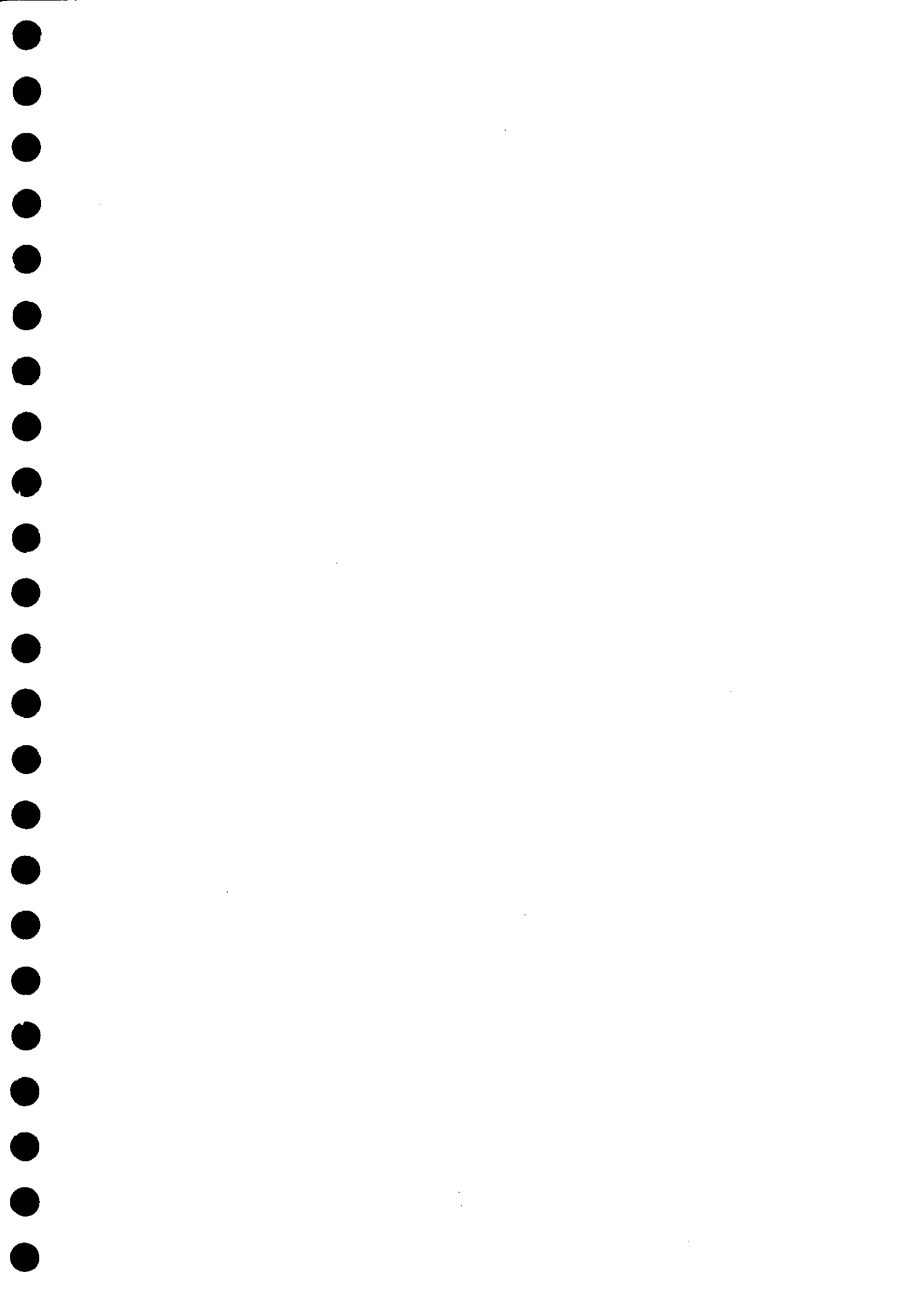
In the same spirit, we have collected together all the training materials - planning sheets, trainers notes, handouts, OHPs, exercises etc - that we used in our training over 3 years and have made them available in this single publication.

Our intention is that people can use this as a 'pick and mix' resource, taking whatever sections they find useful and using it to design their own training. All we ask is that you credit GPAP whenever appropriate and that you don't use our work for commercial purposes.

Please note that by the time you read this some of the information it contains (particularly the sessions around Benefits, Terms and Conditions and Tax and National Insurance) will be out of date so do check and update before you use it.

Lastly, this is a one-off publication, produced with limited finances at the end of the Project's life. There are limited copies in circulation and no others are available so please don't contact the Council on Disability for more.

Do copy the information yourself and make it available to other Disabled people and Disability organisations.



- Introduction to the Training -

We ran several training sessions during the life of the project. However we offered 3 main courses and it is these that are covered in this publication. Further details are given in the introduction to each section.

Design, recruit and manage personal assistance

This is a 10 session course, aimed at Disabled people who want to develop an understanding of Independent Living and personal assistance. It also provides an introduction to employing a personal assistant and practical details of what is involved.

The course is designed so that it can be run either as a complete course or as two stand-alone halves, each of 5 sessions. We always ran it as one complete course with a break of one-week in the middle. One person, however, did complete the first and second halves at different times.

PAPP Chats

These are a series of six stand-alone two-hour sessions which provide a more general introduction to issues around Independent Living - recruiting and employing staff, health and safety in the home, using Direct Payments and the Independent Living Fund and so on. The sessions were designed less to be led, more to provide an opportunity for people to chat around the issues raised and to learn from each other.

Home Care Staff Training

This is very different to the other two courses in that it is aimed at social services staff who provide home care for Disabled people. The training is a small part of a six session course run by social services and offered to home care staff who have either recently started work or longstanding staff who never underwent training in this way in the past.

The training was designed by Disabled people who are home care and personal assistance users and it is mainly delivered by them.

- The Training Methods etc -

Brainstorms / Buzzgroups

We used Brainstorms throughout our training as a way of encouraging people to take part in the discussion and to find out what people really thought about something. Ask a question "What or who Disables you?". You can either take answers randomly from the floor, go around the room asking for one item from everyone or combine the two.

Write **all** the answers up on a **flipchart** and everyone can see that their contribution is valued. If something is clearly wrong or controversial still write it up and ask people what they think about it.

Buzzgroups are when you ask people to split into smaller groups to discuss something. We often set them a task to report back on such as "Come up with 5 qualities you wouldn't want in a personal assistant". Answers were taken in the same way as for Brainstorms. Buzzgroups allowed quieter people the chance to say what they felt and provided an opportunity for everyone to discuss something in more depth with different people.

Breaks / refreshments

It is important to build regular breaks into your training sessions. People get tired and often need to stretch or change position. Support staff, particularly interpreters/communicators, need regular breaks. Training is often a social event for people who may not often get a chance to discuss issues with other Disabled people and breaks allow them a chance to interact.

Exercises

Each session of the 10 week course ended with an activity for people to do at home. These were designed to develop people's confidence in doing the course and to direct their thinking about their own personal assistance packages.

Completed exercises were also necessary as part of the accreditation process for the open college (see section 14). Learners need to show that they can apply what they have discovered during the sessions.

Flip Chart

We used the Flip Chart, both as an alternative to the OHP, and for writing up people's ideas and points during discussion, brainstorm and buzzgroups. The Flip Charts themselves provide a useful record of what went on during the sessions and often the information gained from participants led to us changing our own Handouts between courses.

Whenever appropriate we printed discussion points out as Feedback Sheets and gave them out to participants, either before the end of the session or by the next week.

Format

Make sure that all your course materials are suitable for the participants. Stick to Plain English and be prepared to produce materials in braille or on audio tape. If appropriate, provide interpreters and/or communicators. If you are using visual materials, Powerpoint presentations, Overhead Projector Slides or Video, you should always fully describe the material during the session.

Handouts

The handouts were designed to provide further information and clarification of the subjects that we covered during the sessions. They also allowed information to be studied at home.

Our training has been designed to maximise contributions from the participants themselves. Sometimes, if everyone was contributing or a particular topic was explored at length, we wouldn't cover everything during the session. Having handouts meant that no one feels under pressure to follow the session plan rigorously.

You are welcome to use the handouts but please remember that some information is specific to Gateshead and some will be out of date or is now incomplete.

Length of sessions

PAPP Chats were two hours long and ran from 1.30pm to 3.30pm. The 10 session course ran for 4 hours, 12noon to 4.00pm. Most people seemed happy with the length of both sessions, particularly as we always built in several breaks. The moderator of the 10 session course, himself a personal assistance user, felt that 4 hours was a bit long for some people and that people were tiring. We wouldn't recommend running training for any longer than this.

Numbers

For our ten session course, we aimed for six participants. This seemed an ideal size to allow everyone a chance to participate as well as providing enough people to generate discussion and alternative viewpoints. We did feel, however, that the course could be run for as few as three people.

PAPP Chats were designed to be run for anything up to 20 people although we usually had about a dozen attending.

You certainly shouldn't cram too many people in to a session and don't worry about low numbers. Every person who attends will benefit in some way and the effort and cost will be repaid tenfold as they move on to independent living.

Overhead Projector (OHP) Slides

We started off as enthusiastic users of the OHP and designed slides for use at all stages of the 10 session course. However, we soon tired of problems with lighting, setting the screen up and numerous accidents with wiring, screen legs and so on.

Eventually, we either read out what was on the slides or put the information on Flip Charts.

Personal assistance

We provided at least two personal assistants (p.a.'s) per session, depending on the number of participants. The pa's were always previously known to us and had been trained by Disabled people in personal assistance. They were there to provide whatever assistance was necessary.

We employed the assistants directly to avoid any confusion about roles during the training. If people turn up with someone themselves (say from their family or day centre) it may inhibit discussion and they are often tempted to contribute themselves.

It also gave people 'hands-on' experience of using and developing a working relationship with someone unknown to them who was clear about their role at the training.

Session Planning

We prepared quite detailed outline plans for every session, giving timings, what we planned to do, how we would do it and what we needed in order to do it. These were refined over time and we have reproduced the final versions at the beginning of each section.

If you use the plans, remember to be flexible. It is more important that people participate and understand the issues involved than you stick strictly to a timetable. If necessary, they can take away **handouts** to read your information in their own time.

Trainers

All of our training has been designed by Disabled people. The training was, in the main, run directly by the Project staff, one of whom is an experienced personal assistance user. We used one non-Disabled speaker to provide an introduction to welfare benefits.

It is important that Disabled people run and control their own Independent Living training. The term Independent Living is often misused by colleges and social services departments to cover solely the teaching of practical tasks and is based on the medical model of Disability.

Trainers Question sheets

When we came to review and evaluate some of our early training sessions we felt that some parts had been too directional. We were tending to basically read out the handouts, imposing our views of what was right and wrong.

We therefore developed the Trainers Question Sheets to ensure that we covered the ground that we felt was important but that the learners were thinking through their own ideas and solutions.

Venue / accommodation

Most of our training was carried out in one large room. The room was not ideal (it had windows in the ceiling, got hot in summer and people got the sun in their eyes), but both it and the building were fully accessible and it offered a loop system as well as easy access to refreshments.

We did initially also use a couple of smaller rooms for our **buzzgroups**. However, it took some time for people to go back and forwards and the disruption soon outweighed any advantages.

Video

We have used two videos in our training. One, 'The 70% solution' features a mock interview, based around a young woman applying for work at a DIY store. The other is edited highlights from an Open University programme about personal assistance.

We used videos reluctantly in that they can be difficult to set up so that everyone can see them and they can be excluding to people with hearing and visual impairments. However, these two do get across information in a way it would be difficult to do otherwise .

One alternative to videos might be role playing but we have always found this quite difficult to set up. Also, the results never seem to repay the effort involved.



- The 10 session course -

Design, recruit and manage personal assistance

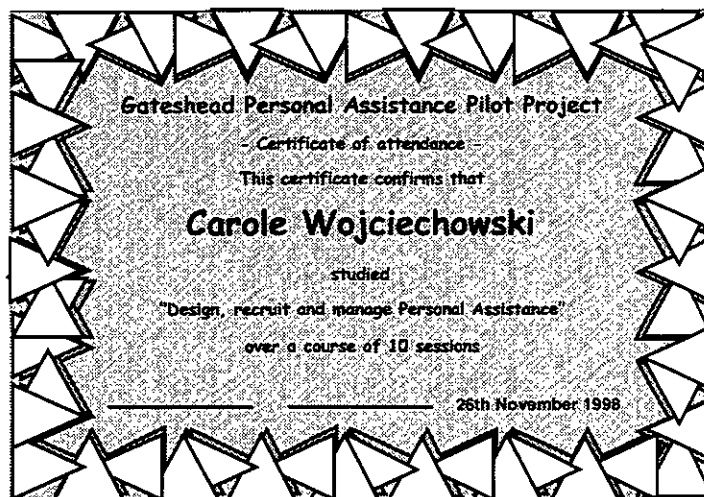
This is a 10 session course, aimed at Disabled people who want to develop an understanding of Independent Living and personal assistance. The course also provides an introduction to recruiting and employing a personal assistant and practical details of what is involved.

The course is designed so that it can be run either as a complete course or as two stand-alone halves, each of 5 sessions. We always ran it as one complete course with a break of one-week in the middle. One person, however, did complete the first and second halves at different times.

We have included details of the planning sheets for each session, copies of the handouts and OHP slides we used, prompt notes used by the trainers and copies of the activity sheets used by the learners.

Everyone who attended the course was awarded a certificate by us. We also had the course accredited by the local Open College Network. People could, if they wished, put their learning forward to an external moderator who awarded them nationally recognised credits at one of two levels. We have given further details of this accreditation process in **Section 14**.

Remember, if you are using any of the course information in your own training, some of it will need to be updated, particularly the benefits information and some of the contractual information. A number of new employment terms and conditions were being introduced as we were producing this publication and therefore couldn't be included.





Planning sheet / Session outline

<u>Time</u>	<u>Content</u>	<u>Activity</u>	<u>Resource</u>
12 noon	Introductions	Talking	
12.05	Ice-breaker - 4 things about yourself	Buzz-groups	Paper + pens
12.15	Feedback from pairs	Feedback	Flipchart
12.20	Domestic matters	Talking	OHP
12.25	Training ground-rules	Brainstorm	Flipchart/handout
12.40	Outline of the course	Talking	OHP/ handout
12.55	Outline of todays session	Talking	OHP
1.00	Lunch	Eating	Food and drink
1.30	What disables you?	Buzz-groups	Paper + pens
1.45	Feedback from pairs	Discussion	Flipchart/handout
2.00	Social and Medical models	Discussion	OHP/handout
2.20	Tea / coffee / orange / water etc	Drink	Refreshments
2.30	What does independence mean to you?	Buzz-groups	Paper + pens
2.40	Feedback from pairs	Discussion	Flipchart/handout
2.50	What is Independent Living?	Discussion	OHP/ handout
3.05	What is Personal Assistance	Buzz-groups	Paper + pens
3.15	Feedback from pairs	Discussion	Flipchart/handout
3.20	Tea / coffee / orange / water etc	Drink	Refreshments
3.30	Advantages / disadvantages of home care	Brainstorm	OHP/Flipchart
3.50	Activity sheets	Talking	Handout
3.55	Summing up the day	Talking	OHP

- Tell us about yourself -

- ◆ pick a partner

You have five minutes each to :

- ◆ tell them 4 things about yourself
- ◆ write down 4 things that they tell you

When we all come back together, tell us what you now know about each other

- Domestic Arrangements -

- ✓ toilets
- ✓ smokers corners
- ✓ John Haswell House rules
- ✓ personal assistants
- ✓ if you feel tired
- ✓ lunch
- ✓ breaks
- ✓ ground rules

- Ground Rules -

We would like to establish
some ground rules
for the training sessions

Things like “no smoking in the training room”.

What rules do you think we should have?

- Ground Rules -

- take an active part in each session - your ideas and views are important
- allow other people to take part as well - provide time and space, encouragement and support and don't interrupt
- challenge each other's views
- however don't attack people as individuals
- ask if you don't understand something
- tell us if there's a problem, if you can't hear or see something or if you want something
- respect confidentiality, don't talk about people or what they've said outside of the training sessions
- try to arrive on time for each session
- stick to the agreed breaks and come back to the training room when we agree
- no smoking in the training room
- no offensive remarks (even as jokes) aimed at specific groups of people
- be aware of your own and other people's health and safety - watch out for equipment, trailing wires, flashing lights
- GPAP will provide Personal Assistance - carers and p.a.'s do not need to attend
- these rules can be changed or added to if we all agree

- Course outline -

▲ **Session 1 - Introduction**

▲ **Session 2 - Assertiveness**

▲ **Session 3 - Self-assessment**

▲ **Session 4 - Services and Support**

▲ **Session 5 - Sources of Funding /
Care Plans**

- - - - 2 week break - - - -

▲ **Session 6 - Recruiting your p.a.**

▲ **Session 7 - Interviewing and Contracts**

▲ **Session 8 - Managing your p.a.**

▲ **Session 9 - Financial Management**

▲ **Session 10 - Course review**

The training methods and resources we'll be using

- ◆ Talks
- ◆ Discussions
- ◆ Question and Answer sessions
- ◆ Buzz groups
- ◆ Brainstorming / thought showers
- ◆ Role Play
- ◆ Guest Speakers
- ◆ Overhead projector
- ◆ Flipchart
- ◆ Videos
- ◆ Ring binder / portfolio
- ◆ Handouts
- ◆ Leaflets
- ◆ Your own notes
- ◆ Activity sheets

- Outline of the rest of the day -

- ◆ lunch
- ◆ buzz groups followed by discussion on what disables you
- ◆ talk and discussion about the social and medical models of disability
- ◆ buzz groups followed by discussion on what 'being independent' means to you
- ◆ talk and discussion about 'Independent Living'
- ◆ buzz groups followed by discussion on 'what is Personal Assistance'?
- ◆ a brainstorm discussing the advantages and disadvantages of homecare
- ◆ introduction to activity sheets
- ◆ summing up

- What disables you? -

- ◆ pick a partner
- ◆ decide which of you will take the notes

You have ten minutes to :

- ◆ write down all of the things,
including people, that disable you

i.e.

those things that stop you doing
what you want to do, when you
want to do it.

When we come back together be
ready to tell us what you have written
down on your list

- What disables us -

- ⊖ being patronised
- ⊖ lack of choice of places to get personal care
- ⊖ people who aren't very nice towards us
- ⊖ steps and stairs
- ⊖ being ignored
- ⊖ expensive taxis
- ⊖ people asking the person I'm with what it is I want
- ⊖ having to tackle prejudice
- ⊖ trying to arrange for someone to go out with
- ⊖ it's sometimes not safe for Disabled women to be out on their own
- ⊖ lack of money
- ⊖ always having to plan things so long in advance
- ⊖ not getting recognition for our efforts
- ⊖ inaccessible taxis
- ⊖ non-disabled people never listen to us
- ⊖ rude and unhelpful taxi drivers
- ⊖ kerbs at pavement edges
- ⊖ heavy doors
- ⊖ lack of orange badge parking spaces
- ⊖ orange badge spaces being stolen by non-disabled drivers
- ⊖ poor maintenance of paths and roads
- ⊖ a lack of choice over what we can do
- ⊖ other people making decisions for you
- ⊖ people assuming they know what you want
- ⊖ having to pay for equipment you need just to get by
- ⊖ having to wait for an assessment to get anything
- ⊖ the assessment process isn't based on what we want - it's about fitting us in to what they've got
- ⊖ waiting lists for anything
- ⊖ 'they' always think 'they' know best
- ⊖ 'they' dictate to us and decide on our behalf what we get

- Models of disability -

- ◆ a **Model** is a guide from which other ideas can be developed.
- ◆ it is something to be copied or followed.
- ◆ it is often one of several approaches to a particular issue.
- ◆ there are 2 main approaches to Disability :
 - the **medical** model
 - and
 - the **social** model.

Questions on the Social & Medical Models of Disability

Medical Model -

Has anyone heard of the medical model of Disability?

Would anyone like to tell us about it?

What kind of people and organisations might use it?

What does it mean for the way they view Disabled people?

How would Disabled people view themselves?

Social Model -

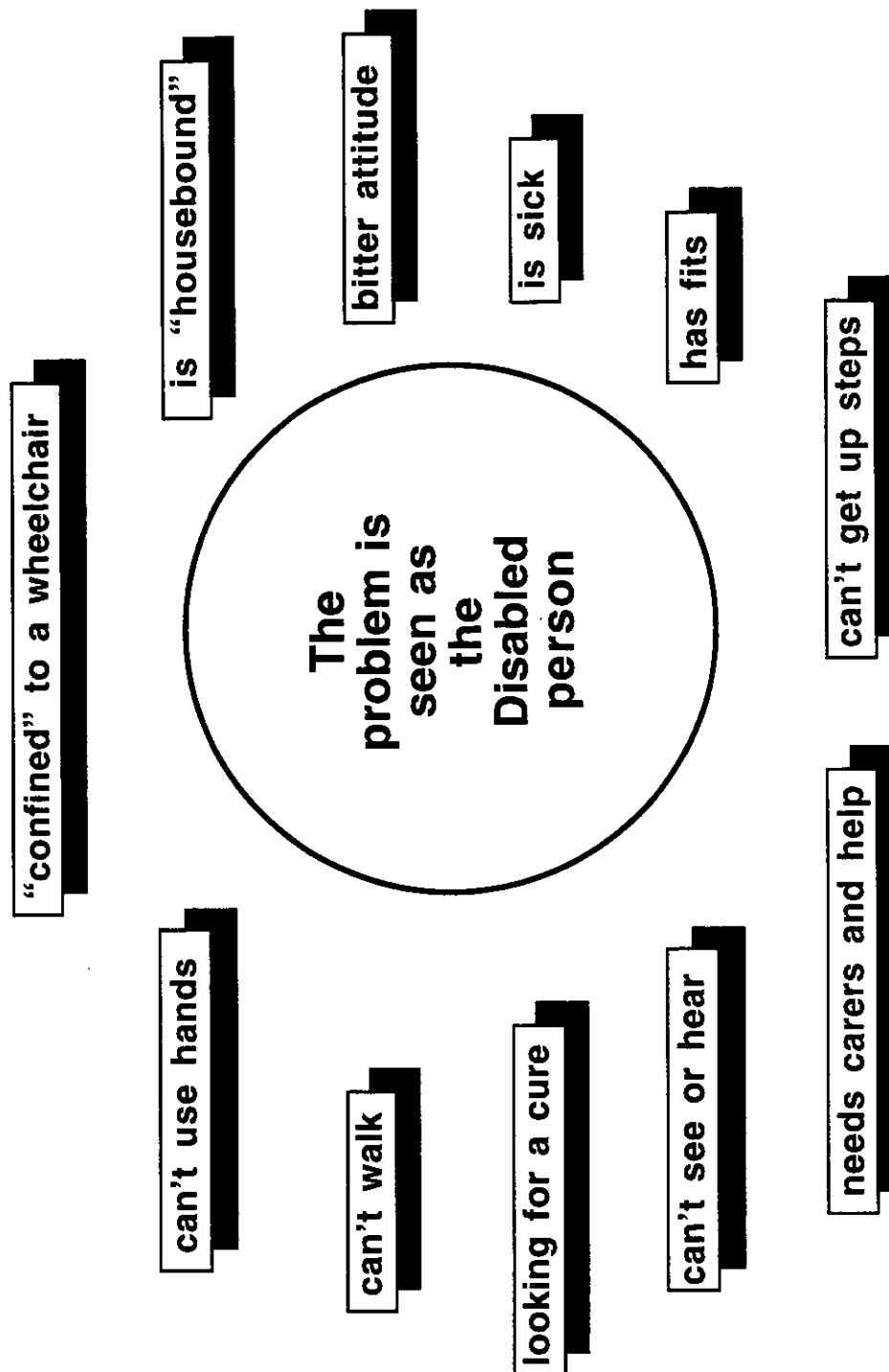
So has anyone heard of the, alternative, social model?

Would anyone like to describe it?

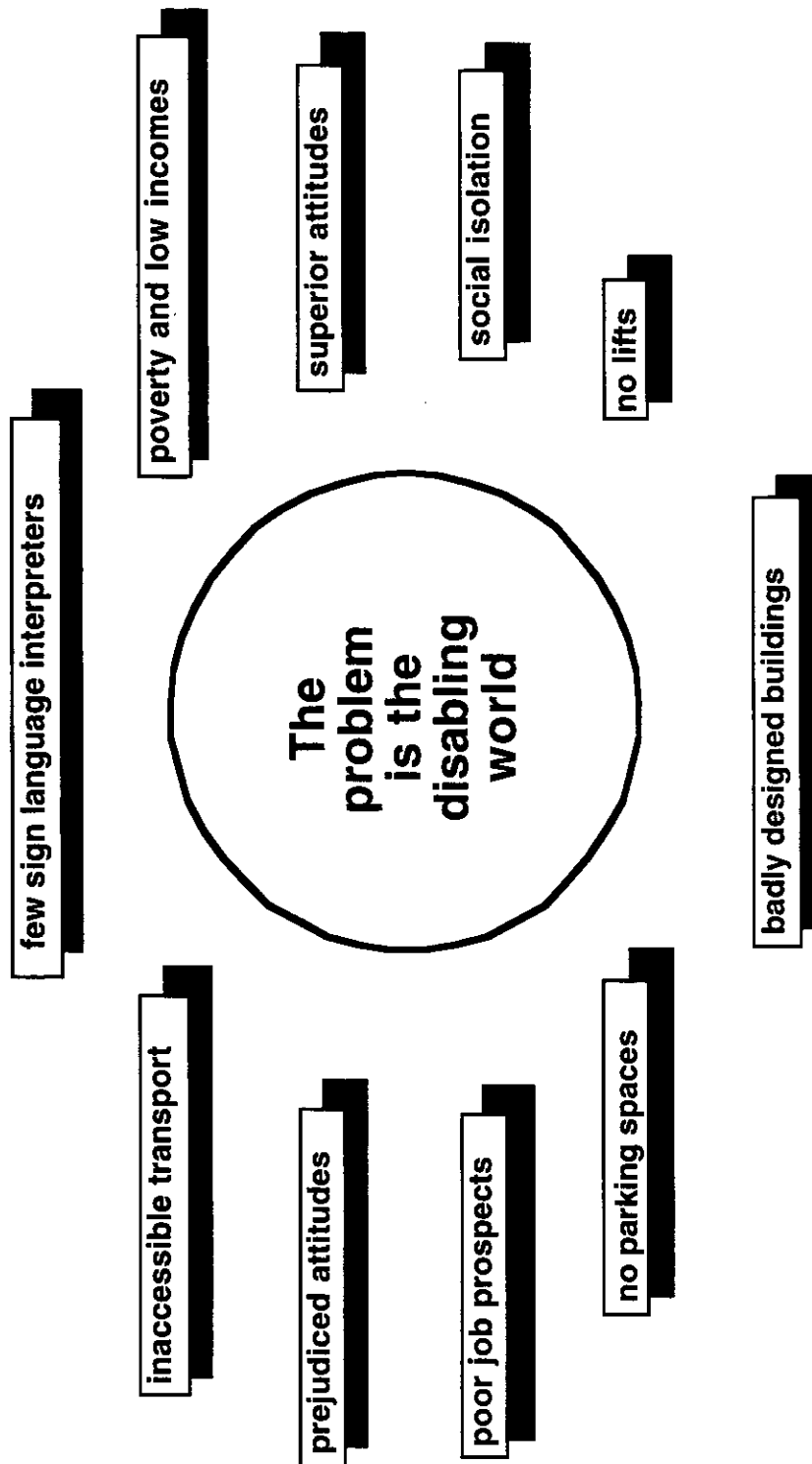
What kind of organisations might use it?

How does using the Social Model allow Disabled people to view themselves differently - what action might they take to change things?

The Medical Model of Disability



The Social Model of Disability



- Social & Medical Models of Disability -

There are two principle approaches to disability, the **Medical** model (sometimes called the **individual** model) and the **Social** model.

◆ Medical Model

- ➡ It is used by governments, local authorities, the NHS, charities and the World Health Organisation.
- ➡ It believes the individual Disabled person is the problem.
- ➡ It views the body as sick or defective and as being in need of a cure.
- ➡ It believes Disabled people are sometimes physically unable to do those everyday activities that non-disabled people can take for granted because of their bodies.
- ➡ Using this model, it is seen as better - or more 'normal' - for a person to be able to stand and walk, even if slowly and with difficulty, rather than to get around more quickly and comfortably using a wheelchair.

◆ Problem with the Medical Model

- ➡ It only highlights some of the things which disable a person and puts all the emphasis on the individual.

◆ Disabled people can end up saying:

- X *"I cannot get involved in the youth club committee because I cannot hear"*
- X *"I cannot go to my local school because I use a wheelchair and it has lots of steps and narrow doors"*
- X *"I cannot get a job because my cerebral palsy stops me getting on the bus to get to work"*

◆ Organisations who use the Medical Model believe:

- X The solution to these problems is to be able to offer individual medical aids or operations which would enable the person to become more mobile or 'normal', or otherwise teach someone to accept their lot.

◆ Social Model

- ➡ This model is an entirely different approach to the Medical Model.
- ➡ It comes from Disabled people's own experiences and is used by all Disabled people's organisations.
- ➡ It accepts that Disabled people have medical conditions which may inhibit them and which may need medical treatment from time to time.
- ➡ It argues that most of the day to day problems that Disabled people face are caused by the fact that they live in a hostile, disabling world which is largely designed to suit non-disabled people.
- ➡ Under the Social Model, Disabled people have **impairments** which affect their bodies and the **Disability** is the disadvantage or lack of opportunity caused by the social barriers which society places in their way.
- ➡ An inability to walk is an impairment whereas the inability to get to the first floor of a building because there is no lift is a disability.
- ➡ An inability to move one's body is an impairment but an inability to get out of bed because suitable physical help is not available is a disability.

◆ The Social Model allows Disabled people to say:

- ✓ *I can't get on a bus because it is not accessible.*
- ✓ *I can't get a decent education because my local college does not support me properly.*
- ✓ *I can't find work because employer's will not give me an interview because of my speech impairment.*
- ✓ *I can't live independently because not enough accessible homes are being built or because my local council will not pay for the help I need.*
- ✓ *I should not have to put up with patronising attitudes.*

- ◆ **Some of the results of Disability discrimination are:**
 - ✗ Disabled people are more likely to be out of work than non-disabled people
 - ✗ special schools are often the only option for Disabled children
 - ✗ Disabled people are unnecessarily segregated because of a badly designed built environment (high kerbs, steps, narrow doors, poor lighting and so on)
 - ✗ people assume Disabled people can't do things or choose to tell them what is best for them.
- ◆ **The Social Model allows Disabled people to:**
 - ✓ identify the factors which disable them and choose to work towards doing something about them
 - ✓ feel good about themselves when their lives are not going well
 - ✓ say it's not me or my body that is at fault, but the society around me
 - ✓ draw attention to the barriers in society and promote solutions which are wider than trying to change the person or curing the individual's impairment
 - ✓ cease to be seen as tragic failures and be seen as people who are discriminated against by the way society is organised.

- Being Independent -

- ◆ pick a partner
- ◆ decide which of you will take the notes

You have five minutes to :

- ◆ write down everything that the words 'being independent' mean to you

e.g.

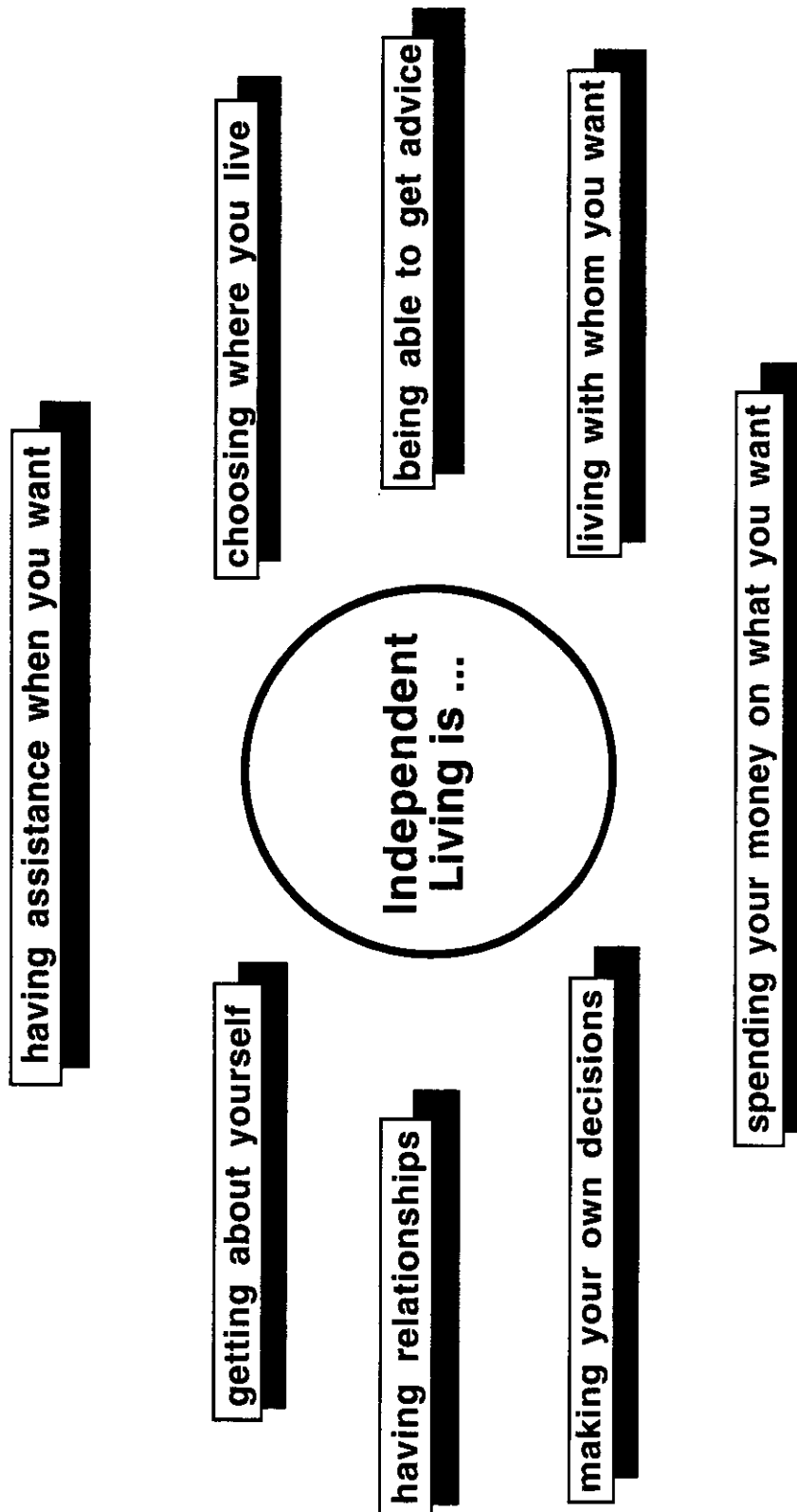
- going night clubbing
- getting my own place
- ignoring my carer

When we come back together be ready to
tell us what you have written down on
your list

- What independence means -

- ↪ doing what I like
- ↪ not having to fit in with other people
- ↪ having friends around to the house
- ↪ staying out as late as I want
- ↪ going to a nightclub
- ↪ companionship
- ↪ eating Chinese food
- ↪ living in my own place
- ↪ doing as little or as much as I want to do
- ↪ having someone to support me if I need it
- ↪ controlling my own life
- ↪ owning a pet
- ↪ going dancing
- ↪ having my own space
- ↪ choosing when I see people
- ↪ choosing who I see
- ↪ being able to go to college
- ↪ being able and willing to change things
- ↪ not having to have a reason!

- Independent Living -



- Independent Living -

Occurs when Disabled people enjoy the same opportunities to live and participate in the community as non-disabled people, free of any forced dependency upon their family or friends, and are able to exercise choice and control over the decisions affecting their own lives.

◆ Independent Living is based on four assumptions:

- ✓ all human life is of value
- ✓ anyone, whatever their impairment, is capable of exercising choice
- ✓ people have the right to take control over their lives
- ✓ Disabled people have the right to participate fully in society.

◆ Origins of Independent Living

- ➔ This idea was developed by Disabled people themselves.
- ➔ It was a response to the discrimination Disabled people experienced when they wished to live in the community or take part in the social, cultural or leisure activities that non-Disabled people take for granted.
- ➔ It has gained credibility as more and more Disabled people have lived independently and demonstrated its positive effects.

◆ Independent Living is not about:

- ✗ doing everything yourself
- ✗ being told what to do by other people
- ✗ being given loads of useless equipment
- ✗ always living on your own.

Although the word independence is widely used, both Disabled and non-disabled people are dependent upon the activities and assistance of others. For example, the everyday objects we all use that are made by other people or when someone drives us in a bus or taxi. Disabled people's use of physical assistance is simply a more intimate way of involving people in their lives.

- Personal Assistance -

What does
the term
'Personal Assistance'
mean to you?

- Personal Assistance -

means that Disabled people who require physical and cognitive support (whether in their personal, domestic, social, educational or employment activities) should have the right to buy, manage and control enough of that support to lead as full and spontaneous a life as a non-disabled person.

Personal Assistance allows a Disabled person to choose and employ their own personal assistant, to do what they want, when they want it done.

Personal Assistance enables a Disabled person to:

- ✓ live in their own home
- ✓ have personal and social relationships on equal terms
- ✓ fulfil their role as a parent or partner
- ✓ have access to education
- ✓ take on work
- ✓ participate in the social and political life of the community

- Home Care -

What are the
advantages and disadvantages
of homecare

i.e.

care that is provided for you
in your home
by other people
such as
Social Services Home Care,
District nurses,
friends and family,
Care Agencies

Activity sheet / What annoys you?

Write down up to 5 things that people say or do to you as a Disabled person which annoy you.

1.

2.

3.

4.

5.

- What we have done today -

- ✓ Introduced ourselves
- ✓ Decided on ground rules for the course
- ✓ Seen what the course will cover
- ✓ Looked at the methods we'll be using
- ✓ Discussed the models of disability
- ✓ Discussed the concept of Independent Living
- ✓ Described Personal Assistance
- ✓ Looked at the advantages and disadvantages of Homecare
- ✓ Been introduced to the Activity Sheets

- Next week -

Assertiveness :
taking control of your own life

- Any Questions or Problems? -



Planning sheet / Session outline

<u>Time</u>	<u>Content</u>	<u>Activity</u>	<u>Resource</u>
12 noon	Feedback from Session 1 activity	Feedback	Flipchart
12.10	Outline of today's session	Talk	OHP
12.15	What rights do we want?	Brainstorm/Discuss	Flipchart
12.30	How do people limit your rights	Brainstorm	Flipchart/handout
12.45	Strategies for getting what you want	Brainstorm	Flipchart
1.00	Lunch	Eating	Food and drink
1.30	Getting past the receptionist	Role-play	Flipchart
1.50	Assertion v Aggression	Discussion	OHP/handout
2.05	Asserting your rights	Discussion	OHP/handout
2.20	What is important to you?	Buzz-groups	Paper + pens
2.30	Feedback from pairs	Discussion	Flipchart/handout
2.40	What will having a p.a. allow you to do?	Discussion	Flipchart
3.00	Tea / coffee / orange / water etc	Drink	Refreshments
3.10	Avoiding/dealing with stress	Exercise	Flipchart/ handout
3.40	Feedback on the course so far	Discussion	Flipchart
3.50	Activity sheets	Talking	Handout
3.55	Summing up the day and next week	Talking	OHP/handout

- Outline of the day -

- ◆ brainstorm and discussion about rights
- ◆ how do **you** get what you want
- ◆ role play - the doctor's receptionist!
- ◆ assertion v aggression
- ◆ tactics for getting results
- ◆ what is important to **you**
- ◆ what can a p.a assist you to achieve
- ◆ avoiding and dealing with stress
- ◆ activity sheet

- Rights -

What rights do you think
you have now?

What other rights
should you have?

- Rights -

How do people
stop
you
getting your rights?

- Rights -

What methods
do you use
(or would you like to use)
to get
your rights?

- Getting past the receptionist -

You ring up wanting to speak to the Doctor to discuss a rather embarrassing side-effect to the new medicine you've been taking.

The receptionist doesn't want to put you through.

How do you respond?

She's got an important phone call.

Do you want a prescription?

What do you want her for?

Is it an emergency?

She's on holiday

Can't you come in?

Can I deal with it?

I think she's gone.

We're very busy.

Will it wait till next week?

She's in with a patient.

Should I send the nurse round?



I want
to speak
to
the Doctor

What is Assertiveness? Questions

What kind of behaviour do you think of as being assertive?

What kind of behaviour is not assertive?

When would you want to be assertive?

When might it be appropriate to be angry or aggressive?

Are there times when it is best to be passive?

- What is Assertiveness? -

Being assertive is very difficult for many people. Even when a person knows what they want, sometimes they may feel as if they do not have the right to ask for it or know how to effectively do so. Having the confidence to say no and refusing to do something when asked by another person can be difficult too.

Assertiveness is about being able to ask for something when you want it, or saying **NO** to another person, without being aggressive or passive.

◆ Assertiveness is:

- ✓ trusting your judgement
- ✓ having strong opinions
- ✓ making a point effectively
- ✓ being listened to
- ✓ feeling as if you are able to make mistakes
- ✓ being confident
- ✓ having self-control
- ✓ using positive body language
- ✓ being able to get on with those around you
- ✓ listening to other people's opinions

◆ Assertiveness is not :

- X being aggressive
- X shouting
- X using threatening behaviour
- X being patronising
- X manipulating people
- X ignoring others
- X being passive

◆ Assertiveness is important because:

- ✓ There are times when other people will try to ignore what you are saying.
- ✓ People may try to put you down with comments or through their behaviour.
- ✓ You may want to raise a difficult issue with a personal assistant or local authority.
- ✓ Someone may be annoying you.
- ✓ You may want others to acknowledge your rights.

◆ Being assertive, aggressive or passive

There are times when aggressive or passive behaviour is appropriate, for example in a threatening situation.

You will need to be assertive rather than aggressive when dealing with personal assistants, voluntary sector agencies or the local authority.

Aggressive behaviour could lead to complaints and action against you, and passive behaviour will allow others to ignore or manipulate you.

The table on the next page gives you an idea about the difference between aggressive, assertive and passive behaviour.

Handout / What is assertiveness?

Aggressive	Assertive	Passive
attacking	being firm	accepting without question
being unreasonable	being positive when asking for something	saying yes to keep the peace
not taking account of other people's feelings	being prepared to say no	being timid
being determined to get your own way	being prepared to listen	hoping you will get your own way

Asserting Your Rights Questions

What kind of behaviour and tactics could help you to assert your rights?

- what information would you need?
- what behaviour or actions do you think gets results from officials?
- would you seek advice?
- would you get support from anyone else?
- what if people didn't listen to you?

- Asserting Your Rights -

- be confident and positive about what you are doing
- know what **you** want and know what your rights are
- seek advice
- be realistic about what you can achieve
- go to the right organisation
- find the right person
- tell them what you want
- use reasoned arguments
- be assertive
- avoid being aggressive
- do not lose your temper or shout
- if ignored, don't be put off
- try saying what you want in a different way
- ask to speak to someone more senior
- keep a record of all phone conversations and a copy of letters you send
- set a reasonable deadline for people to respond to your requests
- if you are then not happy seek further advice
- contact your MP or local councillor
- ask how you can make a complaint
- don't take things personally

- What is important to you? -

- ◆ pick a partner

You have five minutes each to :

- ◆ tell them the things that you would most like to do
- ◆ write down the things that they tell you

When we all come back together, tell us what you now know about each other

-What we most want to do-

- ⇒ go to Egypt and see the valley of the kings
- ⇒ go on a world cruise
- ⇒ live by the sea
- ⇒ live in Florida
- ⇒ live where it's always warm
- ⇒ live where it's wheelchair accessible
- ⇒ live where Disabled people are accepted
- ⇒ own and drive a car
- ⇒ go to Madam Tussauds
- ⇒ teach people
- ⇒ deep sea diving
- ⇒ have a job in a hospital, helping people
- ⇒ visit Las Vegas and play the slot machines
- ⇒ work part-time, the hours I wanted to
- ⇒ control my own personal assistant
- ⇒ get on a bus
- ⇒ whatever we want, when we want

- Personal assistants -

- ➡ What do you think having a personal assistant will allow you to achieve?
- ➡ What difficulties might having a personal assistant cause you?

What would having a p.a. allow me to do

- ⇒ give me more confidence about going out
- ⇒ provide support
- ⇒ stop me being Disabled
- ⇒ allow me to live independently
- ⇒ make things easier
- ⇒ I would feel stronger about taking on the world

What problems might I have with a p.a

- ⇒ I might not get on with them
- ⇒ there could be a personality clash
- ⇒ difficult balance being being an employer and being a friend to someone
- ⇒ being in charge of someone
- ⇒ being detached from them
- ⇒ if you employed a friend, you could lose them if you fell out over their work
- ⇒ they would know all about my finances
- ⇒ should you be friendly with your p.a?

Understanding Stress Questions

- ◆ What causes you stress?
- ◆ How would you know if you were stressed?
- ◆ How can you prevent stress?
- ◆ How might you manage your stress?
- ◆ Can stress ever be positive?

- Understanding Stress -

Stress is a fact of life, but it is possible to manage it. Stress should be taken seriously and tackled as soon as possible since it can have a negative impact on an individual's health. Understanding why stress occurs allows us to reduce it temporarily or permanently and /or learn to cope with life's pressures more effectively.

◆ What causes stress?

- ➔ **Change** such as moving, adjusting to an impairment, employing a new p.a. and so on.
- ➔ **Anxiety** can occur when someone loses control of a situation or when their confidence is knocked.
- ➔ **Grief** can be caused by the loss of a friend or loved one or when someone acquires an impairment.
- ➔ **Boredom** can occur when someone is isolated and is not allowed to engage in those activities they enjoy.

◆ The signs of stress:

- X aches and pains
- X nervous habits such as nail-biting and grinding teeth
- X back pain
- X skin rash
- X digestive problems such as an upset stomach
- X difficulty sleeping
- X mood changes which can mean depression, frustration, irritability, impatience or restlessness
- X aggressive behaviour
- X attempting to do several things at once
- X leaving jobs undone
- X talking too fast or too loudly

◆ Stress prevention strategies:

- ➔ **Have a positive attitude to life** - make a list of things you can look forward to in the next week or month and decide you will make them happen.
- ➔ **Don't regret the past.**
- ➔ **Set your priorities** - decide who and what is important to you and keep those elements of your life in focus.
- ➔ **Barricade the doors** - concentrate on your own needs.
- ➔ **Take on major changes one at a time** - don't overload yourself by changing a number of things at once.
- ➔ **Lighten your load** - if you are doing too much, choose to dump or delegate those activities which are not important to you and leave enough time and energy for those that matter.
- ➔ **Don't set yourself impossible standards** - set yourself tasks that you can realistically achieve.
- ➔ **Treat yourself** - relax, watch a video, go to the cinema, organise some quiet time for yourself during hectic periods, arrange a get-together with friends if you have been isolated and so on.
- ➔ **Plan for stressful events** - to relax before, during and after.
- ➔ **Don't lose sleep over small issues** - try and treat everything as a small issue.
- ➔ **Don't say 'I must' say 'I may'**
- ➔ **Practise saying no** - take on what you can do and turn down all other requests.
- ➔ **Write down your worries** - they often seem better when written down.
- ➔ **Talk to someone** - get it off your chest.
- ➔ **Know when to stop.**

◆ Dealing with stress

- ✓ Go to stress reduction classes at a local college.
- ✓ Learn relaxation exercises from a book or tape.
- ✓ Build sports, physical activities or exercise into your routine.
- ✓ Do something creative such as painting, pottery or needlework.
- ✓ Identify what are the sources of your stress, including the environment, other people, and the way you approach life.
- ✓ Change your routines.
- ✓ Avoid people that wind you up.
- ✓ Resolve to be kinder to yourself.
- ✓ If you want to, have a good cry - never feel ashamed of expressing your true emotions
- ✓ Feel comfortable putting off until tomorrow what you are not able to do today.
- ✓ Have calm thoughts, picture calm scenes and remember calm sounds.
- ✓ Avoid anything like coffee, cola drinks or alcohol which interfere with a good nights sleep.
- ✓ Eat regularly.
- ✓ Share your life with a pet.

- Any problems so far? -

- ① Taxis and transport
- ① Access into the building
- ① Access inside the building
 - toilets
 - training room
- ① Room layout
- ① Heating / ventilation
- ① Use of OHPs
- ① Handouts
- ① Can you hear everything?
- ① Can you see everything?
- ① Discussions
- ① Is lunch OK?
- ① Are there enough breaks?
- ① Is there enough personal assistance?
- ① Course start and finish times
- ① Your other commitments

Activity sheet / Assertiveness

Write down 3 things that you like about yourself.

①

②

③

Write down 3 things that you do well.

①

②

③

Write down 3 things that you don't do now and that you would like a p.a. to assist you with

①

②

③

- What we have done today -

- ✓ Presented our Activity Sheets
- ✓ Discussed our rights
- ✓ Looked at how people stop us getting our rights
- ✓ Learned strategies for getting what we want
- ✓ Discussed and understood the difference between assertion and aggression
- ✓ Decided what things are important to us
- ✓ Considered what having a p.a. would allow us to achieve - and the problems they might bring
- ✓ Learned ways to avoid and deal with stress
- ✓ Discussed this weeks Activity Sheet

- Next week -

Self - assessment :
deciding your own needs

- Any Questions or Problems? -



Planning sheet / Session outline

<u>Time</u>	<u>Content</u>	<u>Activity</u>	<u>Resource</u>
12 noon	Feedback from Session 2 activity	Feedback	Flipchart
12.10	Outline of today's session	Talk	OHP
12.15	What does self-assessment mean to you?	Brainstorm/Discuss	Flipchart
12.25	What is self-assessment?	Discussion	Flipchart/handout
12.30	Your self-assessment?	Buzz-groups	Paper + pens
12.40	Feedback from pairs	Discussion	Flipchart/handout
12.45	Example of a self-assessment	Talk	OHP/handout
1.00	Lunch	Eating	Food and drink
1.30	A typical evening? - exercise	Buzz-groups	Paper + pens
2.00	Feedback from pairs	Discussion	Flipchart/handout
2.20	Tea / coffee / orange / water etc	Drink	Refreshments
2.30	What can you ask a p.a. to do?	Brainstorm/Discuss	Flipchart
2.50	Trevor and SIA correspondence	Discussion/handout	Handout
3.20	Tea / coffee / orange / water etc	Drink	Refreshments
3.30	What 5 qualities important in a p.a?	Brainstorm/Discuss	Flipchart/handout
3.50	Activity sheets	Talking	Handout
3.55	Summing up the day and next week	Talking	OHP/handout

- Outline of the day -

- ◆ what do the words self-assessment mean to you?
- ◆ what activities would you include in your own self-assessment?
- ◆ talk through a self-assessment for a 'typical' morning
- ◆ lunch
- ◆ working in pairs to complete a self-assessment for a 'typical' evening
- ◆ what is it reasonable to ask a p.a. to do?
- ◆ what is it not reasonable to ask a p.a. to do?
- ◆ correspondence from 'Forward', journal of the Spinal Injuries Association
- ◆ what 5 qualities would you consider most important in a p.a.
- ◆ activity sheets - 'What do I want to do'
- ◆ summing up

- What do you understand by self-assessment? -

Today we are going to be looking at the idea of 'self-assessment'

What does 'self-assessment' mean to you?

What do you think of when you hear the words 'self-assessment'

What is self-assessment?

- ➡ **The starting point is what you want to do in your life**
- ➡ **It is based on your needs - what do you have difficulty doing?**
 - ✓ Needs are defined by you
 - ✓ It takes social needs into account
 - ✗ No one else 'assesses' your needs for you
- ➡ **What kind of assistance do you want to enable you to meet your needs?**
 - ✓ you decide how you want your needs met - friend, p.a., health visitor etc
 - ✗ it doesn't matter at this stage what services are usually provided locally
 - ✗ it need not be limited by the amount of money that is usually spent on people
- ✓ **The process is controlled by you**
- ✗ **It does not involve compromise**

- What would you include in your self - assessments? -

- ◆ pick a partner
- ◆ decide which of you will take the notes

You have six minutes to :

- ◆ write down as many things that you can think of which you would include in your own self-assessment

e.g.

those things that you need and want personal assistance with

When we come back together be ready to tell us what you have written down on your list

Self-assessment of a typical morning

Assistance Needed	Time of morning	How many minutes
Sit up in bed	8.00am	five
Make and bring breakfast	8.05am	fifteen
Feed and change Luther's litter tray	8.20am	ten
Bring newspaper and then dust & Hoover	8.30am	thirty
Prepare clothes for today	9.00am	ten
Transfer to wheelchair	9.10am	five
Toileting	9.15am	five
Showering, washing hair and drying	9.20am	twenty
Dressing	9.40am	ten
Toileting	9.50am	ten
Complete dressing	10.00am	ten
Hair Care	10.10am	five
Make tea whilst shave and clean teeth	10.15am	ten
Help me sort new post, file and pay bills	10.25am	fifteen
Push me to and from and around supermarket	10.40am	ninety
Put shopping away	12.10pm	ten
Hang up clean washing, make tea and leave	12.20pm	ten

Self-assessment of a typical evening

Assistance needed	Time of night	How many minutes
Personal needs		
Undressing for bed		
Teeth cleaning		
Domestic needs		
Preparing & Cooking tea		
Ironing		
Social needs		
Using my music system		
Going to the pub		

Self-assessment of a typical evening

Assistance needed	Time of night	How many minutes

- a p.a.'s work -

What is it not reasonable
to ask a
personal assistant to do?

You shouldn't ask a p.a. to

- ×** lift very heavy weights
- ×** change curtains on a Friday (if from home care)
- ×** endanger themselves
- ×** shift furniture without appropriate equipment or support
- ×** clean up the dog's poo
- ×** change the cat litter if you can manage it yourself
- ×** use unsafe equipment
- ×** work without a break or a drink
- ×** do anything illegal
- ×** paint and decorate
- ×** get involved in your direct action
- ×** do anything they're not qualified or trained to do
- ×** take sides in your disputes
- ×** sort out your relationships with people
- ×** lie for you
- ×** do things you wouldn't do

The facilitator, the enabler or just unreliable and unadventurous?

We have reproduced below some correspondence which appeared in the magazine of the Spinal Injuries Association over the period November 1995 to October 1996. The original letter from Trevor Jones sparked a lively response and raised many issues at the heart of Personal Assistance.

Spinal Injuries Association member Trevor Jones opens the debate on personal assistance and just what it is reasonable to expect your p.a. to do. By empowering you, do they become disempowered? Let us know what you think.

The biggest problem in my life since becoming tetraplegic is the personal assistant. I should know, over the past seven years I have had hundreds of them! Though not really wanting anyone on whom to depend, I accept the personal assistant is the facilitator, the enabler. They are my arms, my legs and my hands, and for me certainly the best way of doing what I want to do when I want to do it.

I try not allow my disability to get in the way of what I want to do and lead as full and independent life as possible.

However in achieving that, the greatest challenge has probably been not allowing my personal assistant to get in the way of what I want to do. Very few have actually said "no" to any of my requests. But the question "what is it reasonable to ask your p.a to do?" does get raised. My answer; ... anything I would have done myself, in plainer terms ... just about anything.

Some don't agree. Last summer whilst in Stoke Mandeville for a minor operation my recently recruited p.a. did a bunk, just cleared off. I arrived back at 9 o'clock one night to a note.

The next day having been put to bed and got up by my neighbours, I rang around the London agencies to find a replacement.

One agency was most enthusiastic to take over my care programme and after visiting set up a rota.

A week later I set off to fly up to Liverpool from Salisbury in my microlight. After helping to set me off, my new p.a, Paula, was to follow up in the car, supply my electric wheelchair and cater for an over night stop, then return to London the next day.

Where are you? On arrival I paged her every ten minutes. An hour later she rang.

"Where are you?" I asked, "Well I'm not sure, she said, it could be the M5 or the M4. Somewhere south of Bristol I think".

I could not believe it, she had been driving for six hours and must have got further than that. She had in fact spent much of the last hour on the hard shoulder thinking the pager's tone was a warning alarm on the car! I kept my thoughts to myself, and tried to reassure her that there was no rush, and to take her own good time in getting here.

An hour later I was surprised to hear the voice of the chap who ran the agency on the phone. He laid straight in to me "What do you think you are doing getting our carers to lift heavy locking

plates in your car, carry fuel, build microlights and drive the length of the country in a vehicle which keeps breaking down...."

Now hang on a sec ..", I attempted to interject.

"I have told Paula to take a train from Bristol Templemeads back to London", he said. "Your car is in the short term car park and the keys are with the British Rail Police".

"What about me?" I said, feeling somewhat stunned.

"That's your problem, but let me make it clear we run a care agency we do not supply engineers or..".

I started to suggest his actions were rather hasty, his attitude unreasonable, if not unprofessional but before much longer one of us had hung up, I can't remember which.

I learned valuable lessons from this experience but not soon enough; a month later I actually put a personal assistant on a plane back from Frankfurt after our relationship had broken down irretrievably. This one I had asked to tow my 30 foot microlight trailer to southern Germany whilst I flew.

She had also had to meet me every night to help me to bed, and to look after the aeroplane. Admittedly before my accident I was a very active young man with a practical and athletic life. I lived on my 37 foot yacht, flew helicopters for the Royal Navy and was never happier than when pushing myself to the limits of physical endurance and practical aptitude.

What I was prepared to do then, and expect others to do for me now varies in the extreme from the average personal assistance tasks which a young female contacting an agency and expecting a job caring for someone sick or disabled might think she will have to do.

OK maybe I am an awkward bugger, maybe I do expect a lot from my carers, but there are some things I have never asked of them, such as to sleep with me ... then again maybe I've missed a trick.

Trevor Jones

While considering the above letter we would also appreciate your views on a particular type of approach taken by some members to their personal assistants.

Some disabled people take the philosophical position that a p.a. is a facilitator. They treat their p.a like a robot, simply giving them instructions. There is none of the usual human interaction.

What do you think of this approach? Can two human beings operate in this way? Is this something our p.a.'s should be trained to handle?

Must try harder at the wind-ups, Trevor Jones; only one out of ten for that letter, I'm afraid. Personal assistants are people, and as an ex-Navy man, you must surely know that to get the best out of them, they should be encouraged, not made to do what you want them to.

Poor Paula! Did you explain what the pager was, what it sounded like and what she was to do with it?

Handout / Facilitator, enabler?

Did you ask her if she knew the route, could read a map and felt capable of carrying out the journey?

The vast majority of p.a.'s are helpful and caring people who honestly like to spend their working day making another person feel better. They certainly don't do it for the wages!

Forget your hundreds of p.a.'s, Trevor. Find, like I did, a main team of three or four first class people who can each put up with you for a full day at a time. Teach them to do the things you need done, treat them with respect, thank them at the end of the day and don't forget their birthdays!

Chris Beasty

With reference to the letter from Trevor Jones concerning what you should expect when employing a Personal Assistant, please read my views. You Trevor are damn lucky to be alive.

If you want to carry on with an out-going, gung-ho lifestyle, please do. But for goodness sake employ your p.a.'s through

personal advertising and do not use Care Agencies.

Think of it this way. Would you ever have applied for the job of a p.a.? Somehow I think not, because you are not the type. So how can you expect such broad-minded, out-going behaviour from perhaps a naive teenager whom has never lived away from home and just needs the employment to make a few bob in their holidays?

By advertising I see no reason why you will not find the persons you require.

Best wishes, Anon.

I am writing to you regarding the article in November's issue of FORWARD Newsletter about personal assistants. I worked as a Personal Assistant for a young tetraplegic woman before I went to college to train as an Occupational Therapist. During the time, I saw several personal assistants come and go. Usually there were few problems other than the odd bout of home sickness.

Handout / Facilitator, enabler?

On the occasions when there were problems between employer and employee / facilitator / enabler / carer /p.a. the problem always seemed (in my opinion) to stem from the p.a.'s attitude towards his/her employer.

Working with and living with someone 24 hours a day is hard work for both parties I agree. Working as a p.a. taught me to respect other people's lifestyles.

I feel that every p.a. before embarking on such a career should sit down and seriously think about why they want to do such a job - what are they there for? Why?. What will their role be working with someone not able to do the things they'd like to?

Unfortunately, I have worked with a p.a. who within a week of arriving had made countless judgments on her employer's lifestyle. She saw her as illogical, old fashioned or just idiotic in the way she chose to lead her life. All because it did not agree with the p.a.'s idea of how it should be run.

Needless to say the partnership was over soon. Potential p.a.'s have to consider the issues of enabling a person to fulfil their lifestyle and not their own.

Louisa Lindsay
Occupational Therapist

Hopefully Trevor Jones's letter was deliberately contentious and does not reflect his real behaviour. Leaving aside for the moment the legal issues arising from an employee/employer relationship (including Health & Safety, and sexual harassment) his fundamental reasoning is flawed.

Mr Jones says "they are my arms, my legs, my hands and for me the best way of doing what I want to do when I want to do it". He then sets out two examples of him using (or abusing) his p.a. to achieve feats which no able bodied individual could expect to achieve. Namely travelling from point A to B by two different methods of transport at the same time. An able bodied person would either have had to call upon a friend or to employ a driver.

He is therefore acting unreasonably in expecting his personal assistant to drive his car and microlight equipment whilst he flies. As for expecting anyone, other than a professional, to act as a haulier and aircraft maintenance engineer in a foreign country; this is simply irresponsible.

The role of the personal assistant is complex, deserving proper consideration. Throughout the debate it must be borne in mind that a p.a. deserves to be treated with the dignity and respect which we as disabled people expect.

It is not acceptable to regard them as robots, or servants or to assume that they will share your interests. I would further suggest that a written Job Specification is the best way to discuss recruitment either with an agency or the individual. This should outline the personal and professional qualities required from the p.a., as well as detailing the duties the p.a. is expected to perform.

In the past three years I have worked with a number of assistants with varying degrees

of success. I would only comment that it is a human relationship/ and as such requires give and take on both sides to be successful.

Stephen Springer

Trevor Jones article raises the question "what is it reasonable to ask a carer to do?" The answer is not straightforward as every one's definition of what is reasonable is different.

According to the UK Homecarers Association, a carer (and any agency involved) should always act to promote and safeguard the wellbeing and interests of clients, behave with honesty and integrity, respect the privacy and property of the clients, and remember that clients have a right to make their own choices.

In return, we believe clients should consider carers much as they would a caring relative or friend and not ask them to act in a way that could be construed by an objective outsider as being unreasonable or illegal.

Handout / Facilitator, enabler?

A client needs to think and act rather like the manager of the carer he or she takes on.

Managing people is a complex process which requires communication, practice, understanding, patience and occasionally compromise.

Managing your own care is made up of several stages:

1. Deciding to take responsibility for your own and your carers' best interests.
2. Providing a clear written job description.
3. Recruiting and training the right person for the job you have defined.
4. Working together as a team.
5. Rewarding the person with reasonable pay and conditions and a few words of appreciation.
6. Learning from experience in order to avoid problems in future.

Most of us dislike having to have a carer to be our hands and feet, even though the carer may be a nice person. However given the

unavoidable fact of a high level spinal injury, having a carer is the only way of enjoying an active and independent life and we've got to make the best of it.

Carers are people not machines, generally they are decent people trying their best to do a difficult job. If they are sometimes asked to compromise (*can you stay on an extra day because...?*) occasionally you may have to also (*I would like to cook a Chinese meal for 10 from scratch, but maybe it is asking too much of you, so will you help me cook a roast instead?*)

Occasionally things will go wrong. In this instance a discussion needs to take place about why it happened and how it can be corrected. This is more effective than shouting 'b****y useless carers, I said do it like THIS!'

Patience is needed but I (the world's most impatient man) never said it was easy... Both client and carer need to be reasonable if either is to benefit.

Peter Henry

I read the letter sent in by Trevor Jones with amazement and I must admit I was a little amused by its sheer audacity. If ever Trevor finds a p.a. who is willing to tend to his needs with the blind obedience he seems to expect please let me know as I think immediate canonization would not be inappropriate.

Has the news not yet reached him that slavery was abolished some years ago? He seems to go through his p.a.'s with the same regularity as most of us change our underpants leaving them by the sounds of things bewildered, milked of human kindness and I would imagine shrieking wild eyed and incoherent at the sight of another wheelchair user and he talks of hundreds of these poor souls!

It would test the resources of a fully operational spinal unit in attempting to keep up with this modern day James Bond. As for asking them to sleep with him, I think he could be on a winner here as if he gets anybody to meet his demands he's got every chance of them collapsing on top of him, while putting him in the sack, from utter exhaustion.

In the words of one of the greatest 20th century philosophers John McEnroe, "you cannot be serious man".

Charles Williams

I loved reading Trevor Jones's letter and I admire Trevor's guts, as he ploughs his way through the minefield of trying to establish his power, in the ever lasting saga of debate about personal assistant's job descriptions. I have been using volunteer p.a.'s since 1985 and although I am not a high flier (in the literal sense) I am well versed in the power games between the p.a. and myself.

I have found that the first month is spent with a new p.a. establishing the basic ground rules. My p.a.'s are taken on for six months and given the option of a further six months if they want to stay on and I'm happy with them.

Success is all to do with attitudes on both sides of the relationship. The first bit of advice I'd offer to Trevor is to dump the agency he is using and not use agencies in the future -

Handout / Facilitator, enabler?

my reason for saying this, is because a p.a. from any agency might have divided loyalties.

I have had p.a.'s of all ages and varying abilities. My first rule is to train them on my physical care needs. If I'm reasonably satisfied that they can handle this aspect of my care, I keep them on after their probationary period of one month has expired.

During the induction month, we establish a working relationship, which doesn't inhibit my lifestyle in anyway. (I'm not physically as active as Trevor - but I am involved with local disability issues, which can sometimes be just as taxing as physical pursuits). I do whatever I need to do and my p.a.'s assist me physically - not mentally.

My Independent Living Scheme uses volunteer p.a.'s (similar to the CSV model) and my key word when they are being interviewed and offered a placement on my scheme, is **flexibility** - I outline my general living routines, but stress, nothing is set in concrete and I reserve the right to change my routines, as and when the need arises.

I agree with Trevor when he

states the role of his p.a. is to enable him to do the things he would do, if he wasn't disabled (provided it is legal). This philosophy is what independent living is based on. The role of a p.a. is as Trevor states - '...to be my arms and legs' and I'd add, 'but never to be my brain...' Once this principle is firmly implanted in the p.a.'s brain, there shouldn't be any conflict or power struggle between us.

I once had a p.a. who said to me 'the trouble with you is that you always want your own way', to which I replied 'yes I know that and make no apology for it'. I then explained that when in my own home, I reign supreme; the moment I go out of my front door, I am subject to a slightly different set of rules and limitations, which are in the main, beyond my direct control. But if I wish to do something outside my home environment, my p.a.'s must have a positive attitude to assist me.

The debate on the relationship between the p.a. and the user of them is nothing new and because human nature is what it is, there's probably no single answer to this complex relationship.

Handout / Facilitator, enabler?

I have had a few rotten p.a.'s who have messed me about and made my life a misery - but I can now cope with these types quickly, rather than let my unhappiness drag on unchallenged.

My final advice to Trevor is carry on doing what you want to do - get p.a.'s who can map read. Plan your adventurous lifestyle and involve your p.a.'s in the planning - try and identify potential weaknesses in your p.a.'s ability and if you are unsure about their capabilities talk to them about it.

But first and foremost - the use of Agency p.a.'s should be dropped - recruit p.a.'s yourself and during the interview stage, try and establish some sort of mutual understanding between yourself and a potential p.a.

Good luck Trevor. The golden rule is never compromise your lifestyle, because of the attitude, or limitations of your p.a.. But always remember p.a.'s are human beings -- they do get tired - they may be daunted by your strength of character - loosen up a bit and get them on your side. Clear Job Descriptions are a must.

Neville Simpson

I am writing in reply to a letter entitled, 'The facilitator, the enabler . . . or just unreliable and unadventurous?' which was written back in November '95. I would like to share my comments.

Firstly, my experience of nursing agencies is pretty much like that of the writer. I suppose that the reason being is, that they are an agency, therefore they seem to attract people who just want to earn some quick cash. Therefore, they tend to be unambitious housewives, or nurses who can fit in a couple of hours between their job and family.

Secondly when the agency gets a job vacancy, they simply tend to ring around the staff on their books until they can find somebody to do it. Therefore Mr Jones, the agent manager may be very enthusiastic, but the person that he finds to actually do the job may not be and could possibly have been persuaded into doing it, and told that it would be 'a piece of cake'.

Handout / Facilitator, enabler?

I would never approach an agency again, as all I have found them to be is quite unprofessional, and in the end I resent paying expensive agency fees, for rubbish staff.

I now use an agency called (CSV) Community Service Volunteers, with which I have had no problems, probably because they all seem to be brighter people, ie students who are taking a year off of university.

Secondly, this is the cheapest way I know of employing staff, therefore I am not wasting my money as well as my time.

And thirdly, as a client you are guaranteed a year's care cover, therefore in no circumstances will a CSV volunteer leave you in the lurch.

The CSV volunteers do tend to be out going and willing to try new experiences, as these people have chosen to be volunteers! CSV volunteers can come from all around the world .

To return to Mr Jones letter, I also had an active job before my injury, and if I had been that p.a., I do think that I would have found driving a 30 foot trailer in a foreign country where I did not speak or read the language very well, difficult!

Though I would have done it!

Have you considered employing a male p.a., if the females do not seem to be strong enough to be able to cope with the job?

Anon.

What 5 qualities would you consider to be most important in a personal assistant?

1.

2.

3.

4.

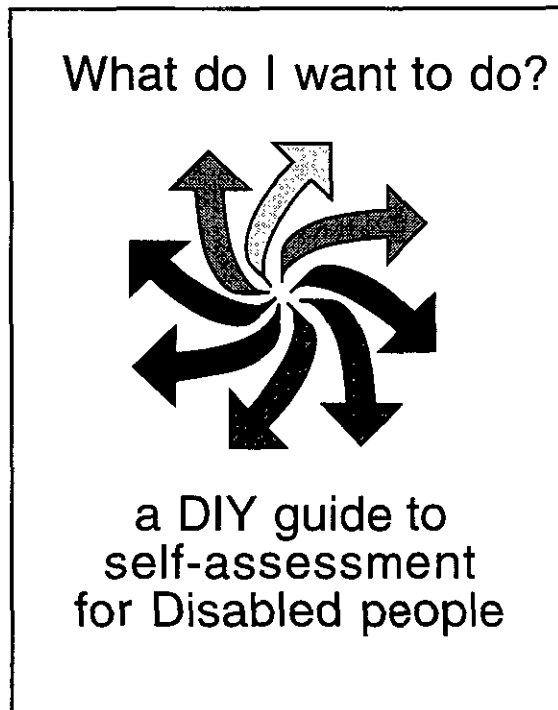
5.

- The qualities you want in a p.a. -

- ⇒ trustworthy
- ⇒ known to you
- ⇒ honest about how they feel
- ⇒ nice
- ⇒ flexible
- ⇒ sense of humour
- ⇒ shared interests
- ⇒ sensitive to my needs
- ⇒ self-motivated
- ⇒ competent and confident
- ⇒ must like football
- ⇒ physically fit / strong
- ⇒ easy going
- ⇒ driver
- ⇒ must have respect for me
- ⇒ must never patronise
- ⇒ reliable
- ⇒ good time-keeper
- ⇒ encouraging and supportive
- ⇒ non-smoker in my presence
- ⇒ if I am, they should be a vegetarian
- ⇒ should like visiting pubs
- ⇒ pet lover / tolerant

- Activity Sheet 3 -

Everyone has been given a copy of



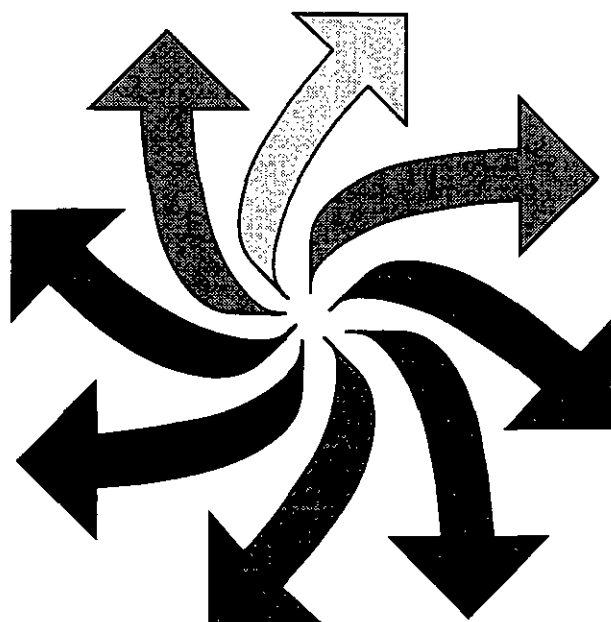
Take it home with you and

- ◆ read as much of it as you can
- ◆ fill-in the tick ✓ boxes in the 'Lifestyle' section (starting page 11)
- ◆ if you have time, fill-in the tick ✓ boxes in the 'Personal Assistance Checklist' (starting page 5)

Don't do the rest of 'Personal Assistance checklist' yet and don't worry if you can't get everything done at once. We can provide one-to-one support to assist you in completing it.

We will spend the hour before lunch next week going through them with you.

What do I want to do?



a DIY guide to
self-assessment
for Disabled people

Gateshead Personal Assistance
Project

Written by Ross Cowan and Bob Watson

Published in October 1997 by :

➤ Gateshead Personal Assistance Pilot Project

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John Haswell House
8/9 Gladstone Terrace
Gateshead
NE8 4DY

(0191) 477 3558 (voice)
(0191) 478 4082 (minicom)
(0191) 477 1260 (fax)
gpapp@disabilitygateshead.org.uk (e-mail)

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Introduction

This is the first in a series of short guides to be produced by the Gateshead Personal Assistance Pilot Project. The Guides provide information and advice to Disabled people in Gateshead who wish to live independently by using Personal Assistance.

Independent Living

At the heart of Independent Living is the principle that disabled people should have full choice and control over all aspects of their own lives. This means control not only in managing tasks such as eating and washing but also in other areas of life such as having personal relationships, working or having fun.

Personal Assistance

Personal Assistance is about the rights of Disabled people who require physical support (from a Personal Assistant) to be able to buy, manage and control enough of that support (Personal Assistance) to lead as full and spontaneous a life as a non-disabled person.

Self-Assessment

This Guide then aims to provide a Disabled person with the tools to assess their own Personal Assistance needs :

- ▶ what do you want to do in your life?
- ▶ what do you have difficulty doing?
- ▶ what kind of help will enable you to do these things?

You will find an example of an Assessment Checklist, a discussion about preferences and lifestyle and a sample Job Outline.

More Information

Future Guides to be produced by the Gateshead Personal Assistance Pilot Project will look at sources of funding for Personal Assistance; the recruitment and employment of Personal Assistants; advice for both Disabled people as employers and for Personal Assistants as employees.

See the last section of this Guide for who to contact for more information, advice or support regarding Personal Assistance.

Assessing your own Personal Assistance needs

Before you think about actually employing your own Personal Assistant (PA), you need to work out what your personal assistance needs are. The most straightforward way is to keep a checklist or diary over a period of a month of everything that you need assistance with. It should be a 24hour record to include overnight assistance.

There are three main areas to consider :

Personal needs - things like getting up and going to bed, washing, eating, bowel and bladder care and so on.

Domestic needs - shopping, laundry, child care, household tasks, driving and so on.

Social needs - getting to work, studying, having fun, going to meetings and so on.

For every activity you need to record :

- ✓ what assistance you need ;
- ✓ at what time ;
- ✓ for how long ;
- ✓ how often (hourly, daily, weekly, monthly).

It is important not to underestimate the amount or type of assistance that you need. In particular, make sure you include **everything** that family and friends do for you now.

Don't forget that you will also need to include all the things that you would like to do but can't do at the moment because you don't have personal assistance! Or those things that you don't do or struggle to do because you don't like to keep asking a family member to do them for you.

Make a 'wish' list, decide how often you want to do something and for how long and add it to your checklist.

Don't forget, Personal Assistance is about choice and control so your checklist should state **your** needs, what **you** want to do and **when** you want to do it.

To help you along, we have included an example of a checklist that has been used by other people (page 5). You can use this or design your own.

Handout / What do I want to do?

Once you've written down the assistance you get now and the assistance you want to get in the future, you can then start to sort out more easily your Personal Assistance needs:

- what times of the day do you need assistance - daytime only, nighttime only, morning and evening only and so on ;
- do you need assistance around the clock ;
- do you need assistance every day, weekdays only or odd days for specific activities ;
- do you only need assistance in your home or wherever you are ;
- do you always need assistance for the same specific set of tasks, such as getting up and going to bed, or do you need assistance for a wide range of tasks ;
- could some things be done more easily with the right equipment ;

Every activity need not be done by just one person or always carried out in the same way. You may decide that you want a Personal Assistant in the mornings and evenings, a cleaner coming in for one day a week and that your child will go to a nursery every weekday afternoon.

Assistance needed	✓ x	Time of day am pm		How many minutes	How often - hourly, daily, weekly etc	Your comments
Personal needs :						
Getting up						
Medication						
Washing face						
Washing upper body						
Washing lower body						
Washing hair						
Menstrual hygiene						
Shaving						
Body hair removed						
Nails clipped						
Feet care						
Skin care						
Eye care						
Ear care						
Combing / brushing hair						

Assistance needed	✓ x	Time of day am pm		How many minutes	How often - hourly, daily, weekly etc	Your comments
Personal needs (con)						
Dressing for day						
Positioning in wheelchair						
Medication during day						
Moved to rest position						
Assist with exercise						
Physiotherapy						
Assist in and out of car						
Toileting						
Undressing for bed						
Washing						
Teeth cleaning						
Night medication						
Dressing for bed						
Settling down						
Moving in night						

Assistance needed	✓ x	Time of day		How many minutes	How often - hourly, daily, weekly etc	Your comments
		am	pm			
Domestic needs						
Tea / Coffee making						
Preparing breakfast						
Preparing lunch						
Preparing tea						
Cooking meals						
Assistance with eating						
Accompanied shopping						
Getting prescriptions						
Storing food etc						
Laying tables						
Lighting fires						
Making / changing beds						
Washing dishes						
Washing laundry						
Ironing						

Assistance needed	✓ x	Time of day		How many minutes	How often - hourly, daily, weekly etc	Your comments
		am	pm			
Domestic needs (con)						
Mending clothing						
Hoovering & dusting						
General cleaning						
Managing heating						
Gardening						
House repairs						
Vehicle maintenance						
Wheelchair maintenance						
Upkeep of equipment						
Child care						
Pet care						

Assistance needed	✓ x	Time of day am pm	How many minutes	How often - hourly, daily, weekly etc	Your comments
Social needs					
Advocacy					
Communication					
Companionship					
Getting to work					
Getting to College					
Studying at home					
With my hobby					
Using my computer					
Using my music system					
Using TV and radio					
Managing bills & money					
Household paperwork					
Personal paperwork					
Socialising					
Going to meetings					

The Lifestyle that you want

If you are going to be bringing a Personal Assistant into your life, you need to think about the lifestyle that you want to have.

Working with a personal assistant is a very personal and intense relationship and you need to be clear about the things that are important to you.

Laying down guidelines or 'house rules' at the start will help to prevent problems in the future.

✓ or ✗

Use this checklist as a general guide to help you get started :

- ▶ Is privacy important to you ☐
- ▶ Is the sex of your PA important to you ☐
- ▶ Does it matter if your PA smokes ☐
- ▶ Is a tidy home important to you ☐
- ▶ Do you mind loud music ☐
- ▶ Do you like your home to be quiet ☐
- ▶ Are there programmes on TV you must watch ☐
- ▶ Is religion important to you ☐
- ▶ Are you willing/able to delegate some tasks ☐
- ▶ Do you prefer to have set routines ☐
- ▶ Do you always want to get up at the same time ☐
- ▶ Do you like planning meals ☐
- ▶ Do you object to meat eating ☐

Handout / What do I want to do?

- ▶ Do you normally prefer to eat on you own ☐
- ▶ Do you enjoy choosing what you wear ☐
- ▶ Is your personal appearance important to you ☐
- ▶ Do you mind other people using your personal items ☐
- ▶ Do you want to entertain at home ☐
- ▶ Do you want friends to stay overnight ☐

This is not an exhaustive list, just a few ideas to start you off. Add your own thoughts here

- ▶ ☐
- ▶ ☐
- ▶ ☐
- ▶ ☐
- ▶ ☐
- ▶ ☐
- ▶ ☐

Job Outline / Information

Once you have identified your Personal Assistance needs and have thought about the way that you want to live your life, you will be in a position to put together a job outline for prospective Personal Assistants.

To give you an idea of the kind of things you could include, here is an example of one produced by someone who lives locally.

Introduction

I broke my neck in a traffic accident 30 years ago when I was 20. I have little movement or sensation below my shoulders. I can however move my arms but have no sensation or movement in my hands.

I am able to do many things around the house but I do require assistance with most aspects of daily living. I always require someone to be available during the mornings and evenings but, depending on my personal activities, may not always need someone to be around in the afternoons.

I would normally use an electric wheelchair for which I need assistance getting in and out of but can control unaided. When necessary, say when I know access will be difficult, I use a manual wheelchair and will require pushing. I have a Possum environmental control system in the house which allows me to use and control a variety of electrical equipment.

I would prefer my personal needs to be met by a female and I need them to be reliable, flexible and to respect my privacy and confidences. I need to take medication at regular intervals throughout the day but this is usually in pill form and requires no special techniques to administer.

Personal needs

Regular

I need turned first thing in the morning, around 8am. I am given my medication and have a drink in bed. Every other day I need suppositories followed, approximately an hour later, by a manual bowel evacuation.

Around mid-morning, I start the process of getting up. Whilst still in bed, I have my lower half washed. I need my skin checked at this point for any red marks indicating pressure. I then have my lower half dressed, which includes changing and attaching my drainage bag.

Handout / What do I want to do?

I need assistance to get out of bed and into my wheelchair using a sling and overhead hoist. I go to the bathroom and have my upper half washed. I brush my own teeth but need assistance with putting toothpaste onto the brush.

I then shave. I use an electric razor and can shave most of my face unaided but need assistance to finish off. I am now ready to have my upper half dressed and my hair combed. Lastly, I have my glasses put on.

At lunch time, I need assistance with medication and have a sandwich and hot drink. At intervals, throughout the day, I may need my drainage bag emptied.

About mid-afternoon I have another round of medication, again accompanied by a drink. I like to have my main meal and further medication between 5pm and 6pm and require assistance with this.

I like to go to bed at about 11pm. Just before this time, I have my final medication and drink for the day. I wash my own face and brush my teeth but, again, I need assistance putting the toothpaste on. I then need my top half undressed and, using the sling and hoist, I am transferred on to the bed. I have my bottom half undressed, my day drainage bag clipped to the side of the bed and the night bag plugged in.

In order to sleep, I need pillows arranging so that I am comfortable. I can usually sleep throughout the night without the need for assistance but there are times when I may need some help.

Less regularly

I would like to have a full bath at least once a week. I have a bath sling and hoist. I like to have my hair washed twice a week. I arrange for a hairdresser to come in and cut my hair every eight weeks. I have finger and toe nails cut as necessary.

I have my drainage changed twice a week. It has happened, rarely, that my bowels don't behave as expected and I would need assistance with cleaning up.

Domestic needs

Once I am up in the morning, I deal with my post. I need the envelopes opened and the correspondence removing but I can physically manage and read my mail.

Handout / What do I want to do?

I use my computer to print letters, envelopes, cheques and so on. I need assistance with preparing items for signing and sealing envelopes and, at times, with changing floppy discs and general fetching and carrying of books and papers to do with projects I am working on.

Although not on a special diet I am a fussy eater with very specific tastes (basically I don't like food) and I like to decide what I will eat. However I am not interested in shopping! For all meals, assistance is needed with laying tables, preparing food, clearing away, washing up and storing plates, cutlery, pots, pans etc. I also need personal assistance with eating food.

Assistance is needed with all general household tasks such as laundry, ironing, storing, hoovering, dusting and cleaning. I am not a fanatic about tidiness but I like the place to be kept clean.

I own a van and would require driving on a fairly regular basis. I would need simple maintenance carried out on both the van and the wheelchair.

Social needs

I like to go out in my van visiting places of interest as often as the mood takes me. I like to visit my local pub, and sometimes to travel further afield, and need assistance with drinking!

I am the chair of a local voluntary organisation and I visit the office on two afternoons a week as well as one evening every two months.

I am interested in military history and would like to travel to other parts of the country to visit museums, record offices and the like.

Your next steps

You should now be in a better position to decide if you want to control and manage your own Personal Assistance.

It may be that having looked at your needs you feel that they can be best served in some other way, perhaps through the use of equipment, via services provided by the Social or Health Services or by using one of the many Home Care agencies.

If you'd like to explore personal assistance further you need to think about :

Funding -

how will you pay for your personal assistance package? Possible sources include Disability Living Allowance, Social Services, the Independent Living Fund, personal finances and so on.

Recruitment -

where will you find a personal assistant(s)? You will need to think about advertising, drawing up a job description and interviewing potential assistants.

Employment -

once you have recruited someone, you will need to provide a contract of employment, pay wages and national insurance and manage your personal assistants on a regular basis.

Don't panic!

There is a wealth of experience out there that you can tap in to, both from individuals who have employed their own personal assistants and organisations which have been established to provide advice and information.

See the details on the opposite page of where to go for more information.

More information

If you live or work in the borough of
Gateshead
and you would like more information about
Personal Assistance
please contact :

Gateshead Personal Assistance Project

John Haswell House
8/9 Gladstone Terrace
Gateshead
NE8 4DY

(0191) 477 3558 (voice)
(0191) 478 4082 (minicom)
(0191) 477 1260 (fax)
gpap@disabilitygateshead.org.uk (e-mail)

If you live outside of Gateshead
and you would like more information about
Personal Assistance
or details of your nearest project
please contact :

National Centre for Independent Living

250 Kennington Lane
London
SE11 5RD

0171 587 1663 (voice)
0171 587 1177 (minicom)
0171 582 2469 (fax)

We need to be clear what we mean by independence. We are not talking about being able to do everything for yourself. Neither does it imply cutting oneself off from the assistance of others.

For what matters is not whether you do something with or without the help of others, but that it gets done under your direction.

Being independent simply means that you have some control over your life, and that you do not live by the routine of others.

Simon Brisenden
'A case of human rights'

- What we have done today -

- ✓ presented our Activity Sheets
- ✓ described what self-assessment means
- ✓ identified a range of activities to include in our own self-assessment forms
- ✓ designed a self-assessment record for a 'typical evening'
- ✓ judged what it is reasonable for a personal assistant to do - and not to do!
- ✓ laughed with Trevor
- ✓ defined the 5 most important qualities in a personal assistant
- ✓ Discussed this week's Activity Sheet - the DIY guide to self-assessment

- Next week -

Using services and getting support

- Any Questions or Problems? -



Planning sheet / Session outline

<u>Time</u>	<u>Content</u>	<u>Activity</u>	<u>Resource</u>
12 noon	Ice-breaker : being positive	Ice-breaker	Flipchart
12.10	Feedback from Session 3 activity	Feedback/talk through	Flipchart
1.00	Lunch	Eating	Food and drink
1.30	Outline of today's session	Talk	OHP
1.40	Where would you go for information?	Brainstorm/Discuss	Flipchart
1.55	Statutory and Voluntary?	Brainstorm/Discuss	Flipchart/handout
2.10	Local services	Discussion	OHP/handout
2.30	Tea / coffee / orange / water etc	Drink	Refreshments
2.40	Getting what you want from orgs.	Brainstorm/Discuss	Flipchart/handout
3.00	When and what to complain about	Brainstorm/Discuss	Flipchart/handout
3.20	Tea / coffee / orange / water etc	Drink	Refreshments
3.30	How to complain	Presentation	OHP/handout
3.45	Activity sheets	Talking	Handout
3.55	Summing up the day and next week	Talking	OHP/handout

- Icebreaker -

Take the first letter of your
first name.

Think of a word that starts
with that letter
and which says something
positive about you.

Dave could be **D**ashing,

Ann could be **A**lluring

- Self-Assessment -

Please tell us what you thought about the self-assessment exercise.

- ? Was it difficult
- ? Did it help you to decide what your needs are
- ? Was it worth doing
- ? Did you decide that you needed more Personal Assistance than you thought you might before you did the exercise

- Outline of this afternoon -

- ◆ where would you go if you wanted to find something out? Brainstorm.
- ◆ the difference between statutory, voluntary and private or independent services? Discussion
- ◆ a look at local services and support.
- ◆ tea, coffee and juice
- ◆ using organisations and professionals to get what you want.
- ◆ when and and what should you complain about?
- ◆ tea, coffee and juice
- ◆ a presentation on 'How to Complain'
- ◆ activity sheets - write a letter of complaint
- ◆ summing up

- Sources of Information -

Who would you ask
and / or
where would you go
if you wanted to find
something out?

- Sources of Information -

Family
Friends
Other Disabled people
Self-Help groups
Colleagues at work
Radio
Publications
Leaflets
Libraries
Newspapers
CAB
Law Centre
Helplines
GPs
Television / teletext
Social Workers
Occupational Therapist
Teachers / Lecturers
Police
Health Visitors
World Wide Web
Taxi drivers
Your stars

- Statutory / Voluntary / Private -

Once, community care type services were mainly provided by the council or the health authority.
Now, a wide range of organisations are involved.

What do the following terms mean to you?

- ⊙ **Statutory authorities / bodies**
- ⊙ **Voluntary organisation**
- ⊙ **Private or commercial**
- ⊙ **Not-for-profit sector organisations**
- ⊙ **Independent sector**
- ⊙ **Service providers**

- Statutory / Voluntary / Private -

⊙ **Statutory authorities / bodies**

Official public bodies which provide or organise services in line with written laws and regulations laid down by the national government.

Examples include social services, hospital trusts, community health trusts, housing departments, education departments.

⊙ **Voluntary organisation :**

Organisations which are independent, controlled by people who are not paid for the time they give. They may employ paid staff to run their services or they may use unpaid volunteers.

Voluntary organisations can charge for providing a service but any money left over will be ploughed back in to the organisation, not paid to the owners or shareholders.

Examples include the Council on Disability, Citizens Advice Bureau, Deaf club.

⊙ **Private or commercial :**

Organisations which are run by individuals or larger companies with the aim of making a profit from providing community care services.

Examples include privately owned residential and nursing homes and day care centres.

⊙ **Not-for-profit sector organisations :**

These organisations may receive money for providing services, for example, as a grant or fee from the council, as rent or by charging users. Any money they make is ploughed back into the service, not kept as a profit.

⊙ **Independent sector :**

Covers all those organisations providing community care services which are not in the statutory sector and which are not-for profit.

⊙ **Service providers :**

Any organisation which provides community care type services.

- Organisations providing advice -

What organisations do you know of in
Gateshead that provide
advice and information?

What kind of advice do they give?

- Sources of advice -

☎ Advice and Information services ☒

These are local voluntary organisations which can provide you with advice, information and support. If they can't advise you, they usually know of someone who can.

All provide their services free of charge. They all offer advice on the phone, usually during normal week-day office hours. If you plan to visit, phone first to check accessibility and opening hours.

◆ Anchor Staying Put

Unit 10, Kingsway House,
Kingsway
Team Valley Trading Estate
Gateshead NE11 0HW

Tel : 482 4977 (voice) 482 4981 (fax)

Provides a service to disabled owner occupiers who need help with repairing, improving and maintaining their properties.

◆ Citizens Advice Bureau

5 Regent Terrace
Gateshead
NE8 1LU

Tel : 477 1392 (voice) 477 4922 (fax)

Provides a free impartial service of information, guidance and support to all individuals either by 'phone, home visiting or drop-in service. The advice and information provided includes social security, employment, the law, relationships, health, disability, money matters, housing and buying things. Representation at a range of tribunals and at County Court is also provided.

◆ Gateshead Council on Disability

John Haswell House
8/9 Gladstone Terrace
Gateshead
NE8 4DY

Tel : 477 3558 (voice) 478 4082 (minicom VII) 477 1260 (fax)
e-mail : gcd@disabilitygateshead.org.uk

Provides a comprehensive information service to Disabled people and service providers based on the Social Model of Disability.

♦ Law Centre

Swinburne House
Swinburne Street
Gateshead
NE8 1AX

Tel : 477 1109 (voice) 477 7667 (fax)

Provides free advice on a wide range of legal matters including disability, discrimination, employment, racism, housing, immigration, mental health and so on.

♦ Tyneside Housing Aid Centre

1 Charlotte Square
Newcastle
NE1 4XF

Tel : 232 3778 (voice) 230 2829 (fax)

Provides independent housing advice and support to homeless and badly housed people in the North East. This includes disabled people looking for more suitable and/or accessible accommodation.

☞ Self-help Groups ☒

There are over 300 self-help and support groups which operate in Gateshead. They can offer advice, information and support and, often, the chance to meet other people.

Some cover a specific impairment such as MS or arthritis, others are more general.

Some are very local and run by volunteers. Others, such as the Spinal Injuries Association are large national organisations with paid staff, offering a number of other services alongside advice and information.

The **Gateshead Council on Disability** keeps up to date a directory of all the local and national disability groups that it knows of. You can phone and ask for information or call in and have a look yourself.

The **Health Information Service** runs a free call telephone information service (see below) and can provide you with similar information.

☎ Council Services ☒

- ◆ **Gateshead Central Library** - the main library and the reference library are at :

Prince Consort Road
Gateshead
NE8 4LN

Tel : 477 3478 (voice) 478 2060 (minicom)

Staff in the reference section will try to find an answer to **any** question that you ask them. You can phone, call in or go to any local library.

- ◆ **Social Services** - the main office for adult disabled people is at :

Prince Consort Road
Gateshead
NE8 4HJ

tel : 490 1616 (voice) 478 5981 (minicom)

You can also go to your nearest local office and they should pass you on to the appropriate person.

If you need to contact Social Services in an emergency when their offices are closed - in the evening, at nighttime, at the weekend or on bank holidays - you can ring them on 477 0844 (voice), 478 2009 (minicom) or 477 9438 (fax).

- ◆ **Housing Department** - the Housing Department has a main office in the Civic Centre and around 20 local Housing Offices. The address of the main office is :

Housing Department
Civic Centre
Regent Street
Gateshead
NE8 1HH

tel : 477 1011 (voice) 478 1905 (minicom)

In an **emergency**, you can contact the Housing Department when the offices are closed as follows:

On Monday to Thursday between 5pm and 8pm, Friday between 4.30pm and 8pm and at weekends and bank holidays between 8am and 8pm phone 477 4511(voice).

From 8pm to 8am (any day) phone 477 0844 (voice).

☞ Advice Lines ☞

These have been set up to provide you with a quick source of information over the phone. They usually provide good general information but cannot take on specific cases. They will, however, be able to tell you who to contact locally and can often send you relevant booklets and leaflets.

♦ **Tax and National Insurance- 0345 143 143 (voice)**

Can answer employers general enquiries about National Insurance, paying tax using the Pay As You Earn (PAYE) system and VAT registration.

♦ **Department of Trade and Industry - 0171 510 0169 (voice)**

Can provide small employers with a number of useful publications which give a basic introduction to aspects of employment law including written statements, itemised pay, fair and unfair dismissal.

♦ **Redundancy Payments - 0500 848 489 (voice)**

Will answer any of your queries about redundancy payments, who is entitled to them, how much should you pay and so on.

♦ **Annual Pack Orderline - 0345 646 646 (voice)**

This is the organisation which sends out all the 'How to' manuals and forms that you need when you are employing someone. You can also get them from the Contributions Agency.

♦ **Health and Safety Executive - 0541 545 500 (voice)**

Can answer enquiries on good health and safety practice and about the need for proper insurance to cover you, your personal assistant and anyone they come into contact with.

♦ **Health Information Service - 0800 66 55 44 (voice & minicom)**








Can provide information on how to contact local self-help groups, and about hospital treatments, operation waiting times and so on.

♦ **Disabled Living Foundation Helpline - 0870 603 9177 (voice)
0870 603 9176 (minicom) : NB. you will be charged 8p
per minute for your call**

Gives advice and information on using and buying equipment large and small - from bath seats and wheelchair hoists to jar openers and tap turners.

Publications

All of these books and guides are in the Council on Disability's library at John Haswell House. The library is open every weekday morning from 9.30 to 12.30. It can also be used in the afternoons if you agree a time in advance.

-  **Controlling your own Personal Assistance Services** by the National Centre for Independent Living
Introductory guide to Personal assistance aimed at Disabled people. Free copies are available from GPAPP.
-  **Directory for Disabled People** by RADAR
Covers most things you might want to know, and provides contacts for following things up.
-  **Disability Rights Handbook** by the The Disability Alliance
The indispensable guide to welfare benefits for Disabled people.
-  **Gateshead Self -Help Directory**
This is a computer database kept up to date by the Council on Disability which gives information on the work of over 300 local support groups and details of how to contact them. You can use the computer or a print copy.
-  **Gateshead A-Z Directory of Community Care 1999**
This has been produced by the Council on Disability and gives information on a wide range of local community care services provided by the council and health services, voluntary groups and the private/independent sector.
-  **Practical Guide for Disabled People** by the Department of Health
General information on services and equipment.
-  **Signposts - A guide to the key sources of information for disabled people** by the National Information Forum
Gives addresses and contacts for all the major national disability organisations.

- Trainers Question sheet - Using Organisations and Professional Support

- ◆ Find out what services or support an organisation can provide - why might an organisation not be able to help you?
- ◆ What would help you to find the right person?
- ◆ If you were asking for support, can you think of anything a worker might not be able to do?
- ◆ What formats could you ask for information to be provided in?
- ◆ How would you behave towards an advisor?
- ◆ How long do you think it would be reasonable to wait for a reply to your initial enquiry?
- ◆ How would you prepare for a meeting with an advisor?
- ◆ Should you ever ignore advice you are given?
- ◆ How will you remember what was said at a meeting?
- ◆ Might it be helpful to have a friend with you?
- ◆ When would you try and resolve something informally?
- ◆ If an organisation can't or won't help, what would you do next?

- Using Organisations and Professional Support -

- ◆ Find out what services or support an organisation can provide.

Sometimes an organisation has to prioritise what work its paid staff do because they do not have sufficient time to respond to all enquiries or requests for help. For example, a Citizens Advice Bureau may only take on a certain number of Disability Benefits Appeal Tribunals cases at any one time.

- ◆ Find the right person.

Each organisation, whether statutory or voluntary, gives each of their paid staff a particular set of responsibilities. It is important to speak to the right person because they will be paid to know what they are talking about. Always describe the issue that you are concerned about as clearly as you can.

- ◆ Ask a worker what they can and can't do.

From the start, ask someone what ways they can help you and what they cannot do. For example, an advice worker may be allowed to advise someone about the options available to them, but may not be allowed to advocate for them in a meeting.

- ◆ Ask for accessible information

Ask for information or correspondence in the form you need it - British Sign language, large print, braille or tape.

- ◆ Maintain a good working relationship.

Never be aggressive towards someone who is helping you. This does not mean that you have to be passive and accept what another person is saying when you believe their advice is wrong. If you think they are wrong, be assertive and say you disagree with what they are saying and give your reasons so that they are able to respond.

- ◆ **Be realistic about the work and time involved in supporting someone.**

When you request help or access to a service, it will take time for someone to respond. Agree a time limit when someone will get back to you with a decision or advice. Don't badger them until this time limit is up as they will not appreciate this pressure. Sometimes you may have to tolerate a situation which you feel is unfair until a dispute is resolved or a service is provided.

- ◆ **Prepare - use your time with a professional well.**

To get the best from any meetings you may have, write down beforehand the points you want to raise and the information or advice you think you need to know. Before you meet with someone, particularly if you are asking for a service, practice what you want to say and get a friend to pretend they are the official you will meet.

- ◆ **Listen**

Always listen to the advice that you are given and don't assume you know best, particularly if someone says you are being unrealistic. If you do not agree with the advice you are given, find someone who can give you a second opinion. Don't make the mistake of refusing advice because it is not what you want to hear.

- ◆ **Record the details of meetings.**

Write down what was said and what decisions were agreed. Ask for an official record of the meeting to be made and sent out to those present. If this is done and you disagree with what is written or feel something has been left out, say so immediately. Minutes are treated as official records of meetings.

- ◆ **Take someone with you.**

You may find it helps to have a friend with you at a meeting to give you support and confirm what was said.

- ◆ **Be informed.**

If you are asking for advice, try to find out as much information as you can yourself about that particular issue. Ask a professional worker to send you information and ask them about all the options open to you.

◆ Resolve disagreements or complaints informally.

Where a disagreement occurs or you feel that you have the grounds for a complaint against an individual or organisation, you should try to sort it out informally by raising the complaint with the particular individual you have been working with.

◆ If an organisation can't help, ask them who can.

Always ask an organisation that is unable to help you where you can go for support locally or nationally.

◆ If an organisation won't help, ask them to reconsider.

If a voluntary organisation says it is unable to help you because it does not have the time, write a letter asking them to reconsider their decision. If a statutory organisation refuses you a service, appeal against their decision. If you are told you are not entitled to a service because "It's policy" or "It's the Law", ask them to give you a copy of the law or their policy and ask an advice worker if they are right.

- Jargon Buster -

Professionals can often use words which you've never come across or don't understand - these words are sometimes called jargon. Here is a list of some commonly used jargon words with an explanation of what they mean.

If someone uses 'jargon' or says anything you don't understand, it's OK to stop them and ask them to explain clearly what they mean.

◆ **Accommodation**

is somewhere to live.

◆ **Advocacy**

is when a person or an organisation helps you to have a say in what you want. There are several different sorts of advocacy:

i) Citizen advocacy : where you work with an advocate on a one to one basis and they provide you with support, help at meetings, with writing letters and so on.

ii) Collective advocacy : a group of people work together to have their say.

iii) Self-advocacy : people learn skills and confidence to speak up for themselves. Self-advocacy means speaking up for yourself so that your life goes the way you want it to. For many Disabled people this involves learning a number of new skills and developing confidence and self esteem.

iv) Professional advocacy : the advocate has specialist skills or knowledge to support you with particular situations or decisions.

◆ **Agency**

is any organisation which provides you with home help, personal assistants, health care or housing services.

◆ **Assessment**

is when someone like a Social Worker or Care Manager looks at what your needs are and what you would need in order to live independently. Sometimes it is called a 'review'. You should be fully involved in any assessment. An assessment often leads to the Social Worker setting out a plan of action, sometimes called a care plan , a care package or an individual personal plan.

◆ **Benefits Agency**

deals with Disability Living Allowance.

◆ **C A B**

stands for Citizens Advice Bureau which is an organisation which can give you advice and help.

◆ **Care Package or Care Plan**

is when a number of different services are put together to meet your individual needs.

◆ **Carer**

is mostly used to describe someone in your family, or a friend or neighbour who provides you with help.

◆ **Client**

is someone like you who uses services, whether you are paying for them yourself or not.

◆ **Community Care / Care in the Community**

means that whenever possible services and support should be provided so that you can live as independently as possible in the community - in your own home or in a 'homely' setting.

◆ **Complaints Procedure**

is the rules that you have to follow if you are unhappy about the help or services you are getting and you want to make a complaint. Most big organisations - Social Services, Housing Associations, Hospitals, GP's, Benefit Agency and so on - now have a complaints procedure.

◆ **Confidentiality**

means that the information someone, such as social services or a doctor, has written down about you should only be given to someone else if you agree to it being shared.

◆ **Consumer**

is someone like you who uses services, whether you are paying for them yourself or not.

◆ **Disability**

is when someone with an impairment(s) is stopped from doing those things which a non-disabled person often takes for granted because of the way that the world is organised - because people can't get into a building or on a bus, because Disabled people are called names and attacked, because print is too small to be easily read, because people you need to ring don't have a minicom and so on. It is the world which needs to be cured and changed, not the individual.

◆ **Discretionary**

is when you might be entitled to something but you don't have an automatic right to it.

◆ **Domestic violence**

is when someone is attacked by someone they share their home with.

◆ **Domiciliary Care Services**

are arrangements that are made to support a person living at home.

◆ **DSS**

stands for Department of Social Security which deals with welfare benefits.

◆ **GUM Clinic**

is a short way of saying Genito-Urinary Medicine. These clinics are based in hospitals. Nowadays they are friendly places where you can go for tests and help to do with genital parts and waterworks; anything from thrush to HIV tests to sexual diseases and so on. You can go along yourself and parents don't need to know. You don't have to have an adult with you.

◆ **Harassment**

is another word for bullying.

◆ **Home visit**

is a visit that is made by an officer such as a Doctor, Social Workers, Housing Worker to the place that you live in. They are usually made if you cannot get in to the person's office.

◆ **Impairment**

is when you lack all or part of a limb (leg, arm, hand, foot etc) or you have a limb, organ (eye, ear, kidney etc) or mechanism of the body which doesn't work fully.

◆ **Income Support**

is a benefit that is paid to people who are poor or who cannot work.

◆ **Legal Aid**

is a system where solicitors offer free or cheap legal advice and help to people on low incomes.

◆ **Local Authority**

is another name for your local council.

◆ **Mandatory**

means that you are entitled to something by law and your local council must provide it.

◆ **Personal assistant**

is someone who helps a Disabled person to carry out everyday tasks such as getting up, cooking, getting around, bathing, putting a book on a shelf and so on. A personal assistant can be employed directly by you, employed through an agency or supplied by social services. However they are employed, remember that personal assistants are there to do what you want, when you want to do it, not the other way around!

◆ **User**

is someone like you who uses services, whether you are paying for them yourself or not.

- When and what to complain about -

Have you ever complained
about something
or
taken something back?

- When and what to complain about -

- a service is provided badly
- a service is provided late or not at all
- if a request for a service or help is turned down
- if you feel a charge for a service is unfair
- if a decision or someone working for you is taking too long
- if you are being ignored
- confidentiality is broken
- you are given wrong information or advice
- someone is advising you when they are not qualified to do so
- if someone is aggressive or nasty
- if someone abuses you
- if someone takes advantage
- if someone tries to push you in a certain direction against your will

- Trainers Question sheet - How to complain

What would you hope to achieve by making a complaint?

What is the difference between making a formal complaint and making an informal one?

When would you use the informal procedure?

What do you need to think about when you make a complaint:

- Do you know who you should make the complaint to?
- Have you identified your complaint clearly?
- What do you want to happen?
- Are you prepared to compromise?
- Formal or informal?
- When is the best time for you do it?
- Do you need any advice?
- What are the different stages of a complaints procedure?
- Make notes of all phone conversations and meetings.
- Relax.

- How to complain -

◆ Why make a complaint ?

Sometimes you may feel as if you have been let down when someone has been supporting you. Or perhaps you have applied for a service you believe you are entitled to but been refused. Don't give up! You can raise the problem with those concerned.

All statutory and voluntary organisations have ways of dealing with disagreements and complaints. Ask for a copy of their leaflet which describes how to make a complaint - they all should have one.

It is your right to complain. If your complaint is justified then this should be acknowledged and any problem should be put right.

However, you must have a good reason to make a complaint. A complaint should never be made because you do not like a particular individual or organisation. Even where your complaint is justified, it should never be made maliciously.

◆ Informal

It is possible to make a complaint without using official complaints procedures. You can raise an issue informally with someone who is supporting you. You can explain why you are not happy with the way they are supporting you or the response of their organisation. This will give them a chance to correct any problems and alert you to any reasons why a problem may have arisen. If you do not feel that you can speak directly to a particular person, you could ask to speak informally to their immediate superior.

◆ or formal

If you make a formal complaint about an individual or an organisation's decision which you are not happy about, your complaint will follow a laid down procedure: it may take time. Also, it may be stressful since any complaints procedure will be very exhaustive. Any complaint that is proven can lead to serious action against an individual or organisation.

Ask the organisation you are considering complaining about whether they can help you to make your complaint. Organisations like the Citizen Advice Bureau or Law Centre can advise you whether your complaint has a chance of succeeding and may also be able to provide you with support.

◆ Making a complaint

Identify your complaint clearly - write down what your complaint is and all the facts that are relevant. Try to anticipate what other people's responses to your complaint might be.

What do you want to happen? - try to be clear about what you want them to do. Do you want an apology? Do you want compensation? Do you want a service to be provided? Do you want someone disciplined?

Are you prepared to compromise? - decide in advance what action you will accept. If you are not happy, how prepared are you to take the complaint further.

Formal or informal? - decide what will be the most effective way of making a complaint. Don't use a sledgehammer to crack a nut.

Find out who you should make the complaint to - if you want an apology from an individual, complain to them first. If you want an organisation to change its policies, contact the Director.

Choose when you will do it - pursuing a complaint can be stressful and take a long time. Make sure you are physically and mentally ready for it. However some organisations have a time limit for making a complaint, so don't wait too long.

Seek advice - talk to a friend or relative; contact an advice agency or your local organisation of Disabled people. Ask if they can provide support if you have to attend a meeting to discuss your complaint.

Find out what the different stages of the complaints procedure will be.

Make notes of all phone conversations and meetings - keep these notes and all letters in a file. If a minute of a meeting is made and you do not agree with it, challenge it immediately. Minutes of meetings are official documents which may be used later.

Relax - when you confront someone, make sure your head (not your emotions) is ruling your mouth. You want to avoid being aggressive. Raising a difficult issue is not easy, therefore you should avoid doing so when you are stressed or emotional.

- Write a letter of complaint -

You booked a taxi well in advance for an important meeting. It arrived 45 minutes late and the meeting was nearly over by the time you got there.

Write a short letter of complaint to the taxi company saying :

- ❖ who you are
- ❖ what happened
- ❖ what you want them to do about it

- What we have done today -

- ✓ developed our Self-Assessment Forms
- ✓ identified sources of advice and information
- ✓ explained the difference between the statutory, voluntary and independent sectors
- ✓ described the sources of local help and advice
- ✓ explained the best use of organisations and professionals
- ✓ discussed when and what you should complain about
- ✓ compared and contrasted different ways of complaining
- ✓ Discussed this week's Activity Sheet - write a complaints letter

- Next week -

Sources of Funding

- Any Questions or Problems? -



Planning sheet / Session outline

<u>Time</u>	<u>Content</u>	<u>Activity</u>	<u>Resource</u>
12 noon	Feedback from Session 4 activity	Feedback/talk through	Flipchart
12.15	Outline of today's session	Talk	OHP
12.20	Community care services?	Brainstorm/Discuss	OHP/Flipchart
12.30	Constructing a Care Package	Talk + Discussion	Flipchart/handout
1.00	Lunch	Eating	Food and drink
1.30	Being formally assessed	Talk + Discussion	Flipchart/handout
2.00	Disability Benefits system	Talk + Discussion	Flipchart/handout
2.30	Direct Payments	Talk and DoH video	Handout / video
3.00	Tea / coffee / orange / water etc	Drink	Refreshments
3.10	Independent Living Fund	Brainstorm/Discuss	OHP/handout
3.35	Charitable Trusts	Talk + Discussion	OHP/handout
3.50	Activity sheets	Talk	OHP/Handout
3.55	Summing up the day and next week	Talking	OHP

- Outline of the day -

- ◆ what community care services are available locally?
- ◆ constructing a Care Package
- ◆ lunch
- ◆ the assessment proces
- ◆ an introduction to the Disability Benefits system
- ◆ an introduction to Direct Payments, nationally and locally
- ◆ the Independent Living Fund - what it is and how to apply
- ◆ Charitable Trusts, what they do and where they are
- ◆ activity sheets - construct your own Care Package
- ◆ summing up

- Community care services -

Think of all of the things
that you know of which
assist a Disabled person
to live in the community.

- Community care services -

- ⊙ Home Care
- ⊙ Home helps - domestic cleaning
- ⊙ Shopping Service
- ⊙ Meals on wheels
- ⊙ Equipment for Daily living
- ⊙ Adaptations to your home
- ⊙ Day centre
- ⊙ Community dental services
- ⊙ District nurses
- ⊙ Telephone rental
- ⊙ Luncheon clubs
- ⊙ Speech and language services
- ⊙ Care bus
- ⊙ Incontinence Supplies
- ⊙ Aids and appliances
- ⊙ Wheelchairs
- ⊙ Leo project
- ⊙ Seating
- ⊙ Learning world
- ⊙ Therapy services
- ⊙ Alarm call service
- ⊙ Chiropody
- ⊙ Talking newspaper
- ⊙ Respite 'care'
- ⊙ Crossroads care
- ⊙ Welfare benefits advice
- ⊙ Orange badges
- ⊙ Concessionary travel passes
- ⊙ Motability
- ⊙ Information and advice services - Council on Disability, CAB, Law Centre
- ⊙ Swimming pools
- ⊙ Hearing aids
- ⊙ Radar toilet keys
- ⊙ Gateshead stadium
- ⊙ Direct payments
- ⊙ Home library service
- ⊙ Sensory impairment team
- ⊙ Housebound writers circle
- ⊙ Anchor Staying Put

- What is a care package? -

Your needs
+
when you need assistance
+
how long you need assistance for
+
who provides the assistance
=
your care package

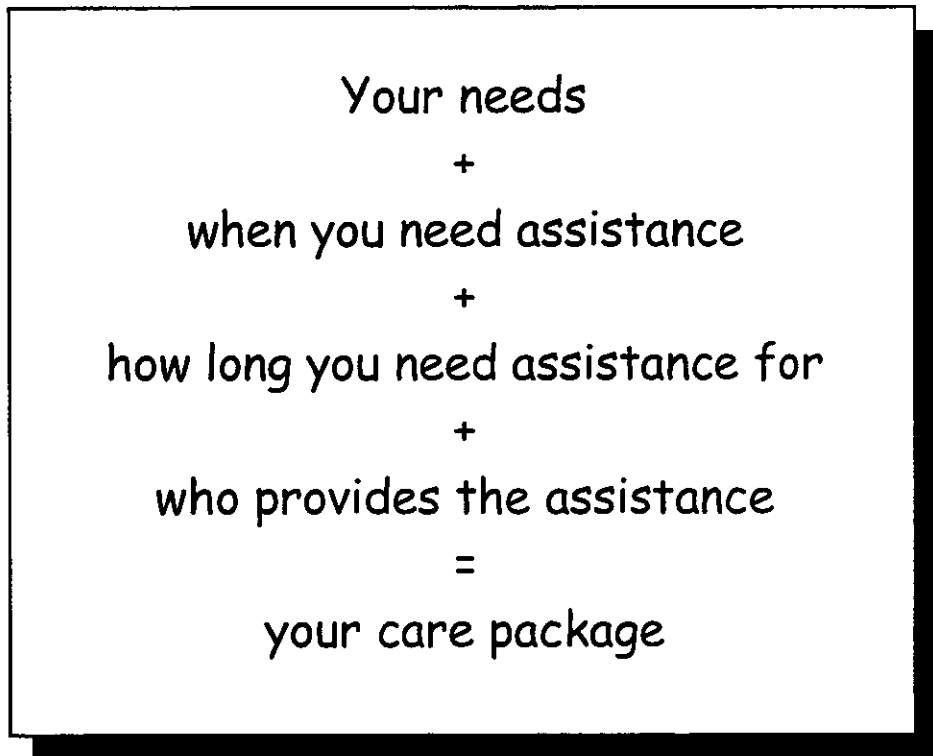
Handout / 'Ideal' care package

- A 'care' package -

	Morning	Afternoon	Evening	Night Time	
Monday	7.30 - 9.30	10.00 - 4.00	7.00 - 10.00		
Tasks	dressing, washing, hair care, breakfast, cleaning	Fountain View - dinner, transport to and from, activities	evening meal, housework, getting ready for bed		
Provided by	homecare	social services	private care agency		
Hours	2	6	3		11
Tuesday	7.30 - 9.30	12.00 noon	7.00 - 10.00		
Tasks	dressing, washing, hair care, breakfast, cleaning	lunch	evening meal, housework, getting ready for bed		
Provided by	homecare	meals on wheels	private care agency		
Hours	2		3		5
Wednesday	7.30 - 9.30	10.00 - 4.00	7.00 - 10.00		
Tasks	dressing, washing, hair care, breakfast, cleaning	Fountain View - dinner, transport to and from, activities	evening meal, housework, getting ready for bed		
Provided by	homecare	social services	private care agency		
Hours	2	6	3		11
Thursday	7.30 - 9.30	12.00 noon	7.00 - 10.00		
Tasks	dressing, washing, hair care, breakfast, cleaning, benefits	lunch	evening meal, housework, getting ready for bed		
Provided by	homecare	meals on wheels	private care agency		
Hours	2		3		5
Friday	7.30 - 9.30	12.00 noon	7.00 - 10.00		
Tasks	dressing, washing, hair care, breakfast, cleaning	lunch	evening meal, housework, getting ready for bed		
Provided by	homecare	meals on wheels	private care agency		
Hours	2		3		5
Saturday	8.00 - 12.00	1.30 - 5.30	7.00 - 10.00		
Tasks	dressing, washing, hair care, breakfast, shopping, lunch	toilet, drive to & from football or cinema	evening meal, housework, getting ready for bed		
Provided by	private care agency	private care agency	private care agency		
Hours	4	4	3		11
Sunday	8.00 - 12.00	2.00 - 6.00	7.00 - 10.00		
Tasks	dressing, washing, hair care, breakfast, church, lunch	Sunday dinner, personal needs	evening meal, housework, getting ready for bed		
Provided by	private care agency	family or friends	private care agency		
Hours	4	4	3		11
Total Hours					59

(shown as half actual size)

- Your Ideal 'Care' Package -



◆ What is a 'care' package ?

A 'care' package is produced by social services after they have carried out a community care assessment. A worker from social services, usually a social worker or 'Care' Manager, will visit you in your home and assess your need for community care services. They will propose a 'care' package they think will meet your needs.

A 'care' package can be made up of different services. These services are given to a Disabled person to meet their needs for physical assistance and support to enable them to live independently. Services that might be included are:

- ✓ home helps
- ✓ assistants provided by a commercial domiciliary care agency
- ✓ funding to directly employ a personal assistant
- ✓ day services such as a Day Centre
- ✓ respite care

Handout / Your care package

The word "care" is usually used because this is the traditional approach and terminology adopted by local authorities and government agencies. However, it is also possible to talk about a Personal Assistance Package.

◆ Who provides the assistance

Because of pressures on funding, and a fairly traditional view of service provision, there will always be pressure on you to accept Personal Assistance provided by a 'carer' - partners, older and grown-up children, other close family members or friends.

You and the 'carer' may be happy with this approach. However, you may want some or all of your services to be provided by an 'outside' agency. This could include home-care services, health services such as those offered by a district nurse, services offered by a voluntary group such as Crossroads or services you purchase yourself using, for example, DLA monies.

Make your wishes clear during your assessment. If a 'carer' is not happy with the amount of 'care' it is assumed they can provide, don't forget that they can now ask for an assessment of their own needs.

◆ Constructing a 'care' package.

Each 'care' package is different. The services that make up a 'care' package, who provides the services and the times they are delivered depend upon the needs, circumstances and desires of each individual.

The final 'care' package should be constructed so that it responds to an individual's need for physical support with a specified range of tasks. It is not possible just to ask for a certain number of hours without justifying how these hours will be used.

For example, someone who needs one hour of assistance each morning will only be given this if they can show how it will be used. The same will be true for someone who needs six hours a day, or just a couple of hours a week.

Constructing your own ideal 'care' package before an assessment is a good way of being clear about what you think you will need. It involves writing down in a table those tasks you have identified in your self-assessment that you need assistance with, the time when they should be delivered, and who they should be provided by.

Handout / Your care package

In the example below, a 'care' package of 50 hours a week would be required. At this level of provision, funding via the local authority and the Independent Living Fund 93 would be needed.

	Morning	Afternoon	Evening
Weekday	7.30 - 9.30	12.00 - 2.00	8.00 - 10.00
Tasks	Dressing, washing, breakfast, phoning, filing	Lunch, housework or voluntary work	Undressing, washing, supper, cleaning.
Weekend	7.30 - 11.30	1.00 - 5.00	8.00 - 10.00
Tasks	Dressing, bath, breakfast, shopping or going to church.	Lunch, visiting family & friends or the cinema.	Undressing, washing, supper, cleaning.

When your 'care' package is developed with the local council, the pros and cons of the different types of services that can be used to meet your needs should be considered if this is possible.

For example, if you need assistance to get into bed but do not want to go to bed before 11.00pm, it would not be appropriate to use home helps if they stop working at 10.00pm.

If you need a 'care' package which will cost more than £200 a week, funding from both social services and the Independent Living Fund 93 will be needed. If you get funding from the ILF 93, you will be expected to use some of your 'care' benefits to pay for your final 'care' package.

If you just receive services from social services, you will be asked to pay a contribution towards the costs of these services.

- Assessment -

Has anyone ever been assessed
by social services?

What happened?

How did you prepare for it?

Is there anything you wish
you had done differently?

- Being Assessed -

If you want social services to fund all or part of the 'care' package that you think you need, you will have to be formally assessed by someone from social services.

They will come out to your home, talk to you about what you think you need and tell you what social services are willing to provide. It is important that you are well prepared for this meeting.

◆ Preparation

▽ **Self-assessment**

Doing a self-assessment of your own needs will allow you to be clear about what support you believe you need.

▽ **Construct your own ideal 'care' package**

Develop a package that would meet those needs identified in your self-assessment document.

▽ **Seek advice**

Talk to GPAPP about Gateshead council's approach to a community care assessment and their possible response to your requests.

▽ **Access**

If you need a communicator, an interpreter, a lip reader or communication equipment to put forward your own views, ask social services in advance to provide this.

▽ **Support**

If it will help, arrange to have a friend or professional worker to support you at your assessment.

▽ **Speak to other people who have had an assessment.**

They can give you an idea about what happens and any arguments they have successfully used.

▽ **Relax**

Although an assessment can be stressful, try to relax before it so that you can think as clearly as possible during the assessment.

◆ During the assessment

▽ **Be friendly towards your social worker**

Although they might not be as responsive as you would like, this may be because they are restricted by the current policies of the local authority.

▽ **Argue for a needs-led approach**

Argue for a 'care' package that will respond to the needs identified in your self-assessment.

▽ **Don't be aggressive**

If the assessment does not go as well as you would like, don't lose your cool as this may count against you.

▽ **Be assertive**

If you don't feel your needs will be met by the services your social worker believes you need, say clearly and precisely why you do not agree with them.

▽ **Ask about each service being proposed**

Find out what each service will include and what they can and can't do.

▽ **Final decision**

Ask when a final decision will be made and by whom.

Ideally you will be offered a 'Care' package which is:

- ✓ needs-led
- ✓ responsive to your wishes
- ✓ based on high quality services
- ✓ flexible
- ✓ allows you to choose who provides the assistance

◆ **What next ?**

- If you agree with the services being offered to you by social services, congratulate yourself.
- If you are dissatisfied with the assessment, ask how you can appeal against their decision. This might take some time.
- You might have to consider using any 'care' benefits you might receive to pay for some of the assistance you require.

Seek advice from GPAP

- Trainers Question Sheet - Welfare Benefits

What are welfare benefits?

Who can get them?

- Disabled people - how is that defined
- people on low income
- people who have paid National Insurance
- people with additional costs

What benefits do you know of?

- Disability Living Allowance
- Disability Working Allowance / Disabled Person's Tax Credit
- Income Support
- Incapacity Benefit
- Severe Disablement Allowance

How much do you get?

How are benefits paid?

Advice?

Welfare Benefits for Disabled people

What are they?

Financial assistance (cash) paid to Disabled people by the Government as part of the social security system. Some benefits are intended to replace earnings if you can no longer work; some are to compensate for the extra costs of disability; and some are meant to help alleviate poverty.

Who can get them?

Unfortunately, the system is quite complicated and different benefits each have different tests to decide if you are entitled to any money and how much money you will get.

① Are you a Disabled person?

The social security system uses four different tests of disability :

- **incapacity for work** - before you can get these benefits you will have to show that your disability in some way prevents from you from working - statutory sick pay; incapacity benefit; severe disablement allowance; industrial injuries benefit; war pensioners unemployment allowance; income support.
- **you need care, supervision or watching over** - this test is used for the Disability Living Allowance care component and for Attendance Allowance.
- **you are unable or virtually unable to walk** - used for Disability Living Allowance mobility component and for war pensioners mobility supplement.
- **how disabled are you** - used to decide entitlement to severe disablement allowance; industrial disablement benefit; war disablement pension; and vaccine damage payments

② Are you on a low income?

Some benefits are also **means tested** - they are only paid to people on low incomes and you have to 'prove' that you have little or no income or savings. These include income support; disabled person's tax credit; housing benefit; and council benefit.

③ Have you paid enough National Insurance contributions?

Other benefits are only given to people who have been in work and have paid a minimum amount of National Insurance in the right years to qualify. The main ones are incapacity benefit and contribution-based jobseeker's allowance (the old unemployment benefit).

④ Do you need money to compensate for the extra costs of disability?

These are not usually affected by any other money you have and don't require you to have paid National Insurance. These include attendance allowance; disability living allowance; guardian's allowance; industrial injuries benefits; invalid care allowance; severe disablement allowance; statutory sick pay; war disablement pensions.

How much do I get?

It will depend on which benefit(s) you get and, for DLA, at what level you get it. You can find out the latest rates in leaflet **NI196 Social security benefit rates** available from post offices. The rates usually go up in April of every year.

How are they paid?

Most benefits can be paid either:

- directly into your bank or building society account. This is known (confusingly for us) as a **Direct Payment**.
- in cash at your post office. You will either be sent a regular **Giro** or receive an **order book** containing up to 6 months of payments slips. Both can be turned into cash at the Post Office. You can either collect the money yourself or nominate someone else (including a homecare worker) to collect it for you.

Compensation payments

One further complication. If :

your impairment was caused by an injury, accident or illness
and

you are now claiming benefits because of your impairment
and

you win compensation from someone for this injury, accident or illness
your compensation may be reduced to take account of the benefits you have been paid.

A brief guide to the main benefits

What follows is a brief and, by necessity, simplified overview of all the benefits that are available for Disabled people over 16 and under the state retirement age. It cannot detail all the different limits and qualifications that may apply so you should always seek advice if you are in any way unsure about something.

Disability Living Allowance - this is a tax free benefit for Disabled people who need assistance with personal care, with getting around or both. You do not have to have paid any National Insurance to get it and it is not usually affected by any other income you may have.

The care component covers things like washing, dressing, using the toilet and meal preparation. It is paid at 3 different rates depending on whether you need frequent attention or part-time attention and whether it is during the day, night or both. You do not have to be actually receiving any care to qualify and you don't have to spend the money on care. However, social services will charge you more for their care services if you receive the middle or higher rates of DLA.

The mobility component is paid to people who need assistance with getting around and is paid at two rates. To qualify you must either be unable to walk or have difficulty in walking or be able to walk but need someone with you. You must be able to benefit from moving so you will not qualify if you are in a coma!

DLA is an important benefit for Disabled people, both in its own right but also because once you qualify you are entitled to a number of other benefits including the disability premiums on Income Support, the Christmas bonus and, for people on the higher rate care component, the Independent Living Fund.

Disabled Person's Tax Credit - is given to people working more than 16 hours a week who have an impairment which puts them at a disadvantage in getting a job. You must be on a low income, have savings below £16,000 and either be getting a benefit such as Disability Living Allowance or you have been getting a benefit in the past 182 days. In addition to receiving the basic tax credit you can get additional credit for each of your children and towards the cost of any childcare you pay for.

Income Support - this is the main benefit paid to people on low or no income and it is intended to pay for basic living expenses. It is means tested but you do not have to have worked or paid National Insurance.

To qualify, you must be classed as incapable of work because of your disability, have less than £8,000 in savings and have little other income.

Handout / Welfare Benefits

However, do note that Disability Living Allowance is not counted as income for people who also claim Income Support.

If you get Income Support, you can also qualify for the **disability premium**. This is an additional sum of money (£21.90 a week) which is paid on top of Income Support to people who pass a disability test.

In addition, if you also get either the middle or higher rate care component of the Disability Living Allowance, you can qualify for the **severe disability premium**. This is £39.75 a week and is classed as an add-on premium - it is paid as well as both income support and the disability premium.

However, in order to qualify for the severe disability premium, you must be classed as living alone and no-one should be claiming invalid care allowance for looking after you. **Invalid care allowance** can be paid to someone looking after a Disabled person who receives DLA, and a carer can be claiming it without your knowledge.

Incapacity benefit - is a benefit for people under the state retirement age who cannot now work because of an illness or disability. To qualify, you must have been in work and you must have paid National Insurance Contributions at the right rate and at the right time.

Severe Disablement Allowance - is paid to people who have not been able to work for at least 28 consecutive weeks because of illness or disablement and who cannot get Incapacity Benefit because they have not paid enough national Insurance contributions. You must be classed as incapable of any work and assessed as at least 80% disabled.

More information

Leaflet FB 28 "Sick or Disabled" - a benefits agency guide to the main benefits for Disabled people.

Disability Benefit Enquiry Line on 0800 88 22 00 (voice) 0800 24 33 55 (minicom) - a specialist advice line run by the benefits agency providing information for Disabled people. They will provide general advice and information and can fill in forms on your behalf for certain benefits.

Disabled Person's Tax Credit Helpline on 0845 605 5858 (voice) and 0845 608 8844 (minicom)

The **Citizens Advice Bureau** and the **Law Centre** can both provide benefits advice.

- Direct Payments -

What are they?

Traditionally, when social services has assessed someone as needing community care support, they will arrange for support services to be directly provided to them. This could include home care staff, meals on wheels, shopping service, time spent at a day centre and so on.

Direct Payments means that instead of arranging the services for someone, the social services department can give a Disabled person the cash equivalent of what the services would cost. The Disabled person then uses the money to purchase their own services.

The Community Care (Direct Payments) Act which allowed this to happen was passed in July 1996, coming into effect in April 1997. A small number of Gateshead residents have been receiving Direct Payments since April 1999.

Who can get direct payments?

To be eligible for direct payments someone must be:

- ▶ a Disabled person. This includes people with physical and sensory impairments, people with learning difficulties, people with enduring mental health problems and people with HIV/AIDS
- ▶ assessed by social services as needing services that the department provides
- ▶ willing to have a direct payment
- ▶ able to manage the payment, either alone or with assistance, and make decisions about how the money is spent
- ▶ currently, over 18 and under 65 when the scheme starts. The law is soon to be changed to remove the upper age limit.

It is important to know that the law only **allows** social services departments to make Direct Payments if they want to - it does **not require** them to set up a scheme. Gateshead have, however, chosen to set up a scheme locally

The Gateshead Scheme

Gateshead Council has set up a pilot '**Personal Assistance Support Scheme**' (PASS) to look at how the social services department can fully introduce direct payments.

The Gateshead Pilot scheme is currently only open to residents of Gateshead who are physically Disabled with a substantial and stable disability. There is no upper or lower limit on the number of hours of care that a person has to be receiving.

Handout / Direct Payments

Participants have to be assessed, selected and approved by the social services department and preference is being given to people "who are likely to most effectively and successfully use the scheme".

The Leonard Cheshire Foundation have been given a contract to run the pilot scheme for the first two years. They have employed a part-time co-ordinator to assist (as far as is required) the Disabled people taking part in the scheme.

The Pilot Scheme has proved so successful that it has already been extended and is likely to become a permanent feature of community care provision in Gateshead.

Why would someone want direct payments?

Direct payments are intended to support independent living and personal assistance. If someone receives direct payments, they can decide how their needs will be met, by whom and at what time. They are in control.

How much do people get?

There is no upper or lower limit but Gateshead will usually not pay more than the cost of residential care. People should get enough money to pay for the services that they have been assessed as needing. They should also get the money to pay for any legal responsibilities they will have as an employer.

As of April 1999, social services are providing an hourly rate of £5.40 which has to cover wages, employer and employee tax and national insurances, holiday and sick pay and so on. There is an additional lump sum payment of £350 to cover things like start-up costs, training, emergencies and administration costs.

What can direct payments be spent on?

The money must be spent to arrange services to meet community care needs. It is not simply extra money to spend as someone chooses. If they wish, and social services agrees, it may be possible to arrange a combination of direct payments and services such as a home help or attending a day centre.

You can pay for short stays in residential accommodation, say to give you a break from a carer, but direct payments cannot be used to pay for more permanent stays.

Who can be employed as a personal assistant?

Basically, it is up to the Disabled person to choose. They can employ someone directly or, if they prefer, they can use an agency to provide staff for them.

However people cannot, without the prior agreement of social services, employ :

- ▶ a spouse or partner
- ▶ a close relative
- ▶ anyone living in their household (except a live-in employee)

- The Independent Living Funds -

◆ What are the Independent Living Funds ?

- ✓ They are administered by the Independent Living Fund, a national charity which is funded by the government.
- ✓ They give Disabled people access to funding for Personal Assistance.
- ✓ Payments are made directly to a Disabled person's bank account.
- ✓ Recipients use this money to pay their personal assistants or to buy the services of a domiciliary care agency.

◆ Independent Living (Extension) Fund

- The first Independent Living Fund was established in 1988. It was set up after pressure from the Disabled People's Movement.
- The first ILF had a budget of £5 million a year to help 400 to 500 people. There were no age restrictions.
- By the end of 1992, the ILF was spending £97 million on about 18,000 people!
- Government concerns about these costs led to rule changes in April 1993. Those already receiving payments were transferred to the new Independent Living (Extension) Fund.

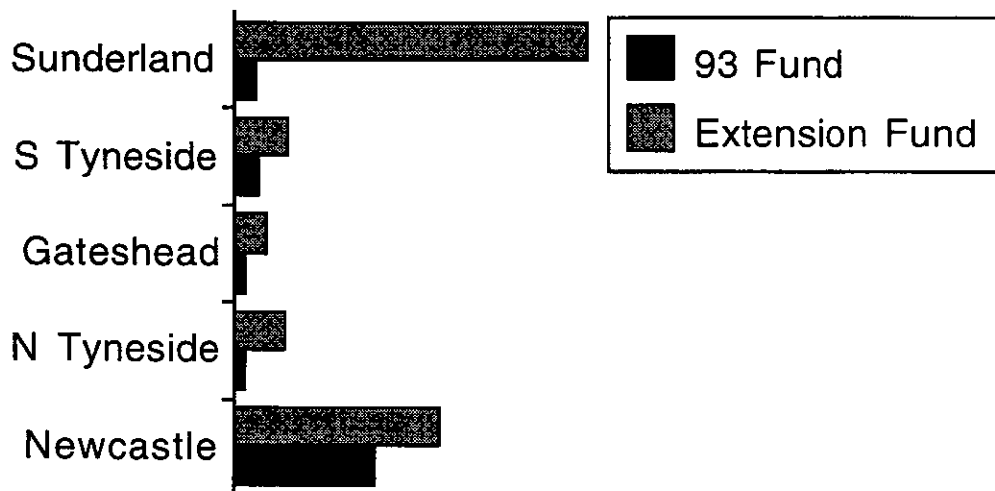
◆ Independent Living Fund 93

- The Independent Living Fund 93 was established for anyone applying after 31st March 1993.
- New applicants had to be receiving at least £200 of services a week from their local social services department.
- This "£200 rule" has stopped many people being able to apply to the ILF 93 because their local authority might only allow a small number of Disabled people to receive this level of services.
- The Direct Payments Act introduced in 1996 was a response to the demands of Disabled people and local authorities for a more flexible system, and allow those people with smaller 'care' packages to employ their own personal assistants.

Handout / Independent Living Fund

- ◆ Applicants to the fund must meet all of the following conditions :
- ✓ be at least 16 and under 66 years of age
 - ✓ receive the highest rate of the care component of Disability Living Allowance
 - ✓ be at risk of entering residential care (or currently be there and wish to live independently)
 - ✓ live alone or with people who cannot meet their assistance needs
 - ✓ be on Income Support or have an income above Income Support level but which is less than the cost of the assistance needed
 - ✓ have savings of less than £8,000
 - ✓ be capable of living in the community for at least six months
 - ✓ receive at least £200 worth of services from their local authority each week.

Number of recipients of the Independent Living Funds in Tyne & Wear on 31st March 1997



- Charitable Trusts -

- ▶▶ a charitable trust is an organisation which has been set up to give away money (make grants) for 'charitable purposes'.
- ▶▶ charitable trusts don't have to pay tax on any interest they make on their money.
- ▶▶ in return, they can **only** give the money away for charitable purposes.
- ▶▶ 'charitable purposes' is a legal term and it includes giving money for "the relief of hardship" and for "the advancement of religion".
- ▶▶ every charity has a charitable deed (set of rules) which sets down who or what they can give money to. There are trusts which :
 - ▶ only give money to individuals
 - ▶ can give to either individuals or organisations
 - ▶ have age restrictions - only giving to, say, children or to people over retirement age
 - ▶ give to people who have a specific illness or disability such as muscular dystrophy, stroke or rheumatism
 - ▶ only give to people who have worked in a certain type of job such as coal mining, banking or local government.
 - ▶ cover people (and their dependents) who have been in the armed forces. SSAFA is the best source of information on this.
 - ▶ give money to pay for specific things such as a holiday, telephone bills,
- ▶▶ the charitable deed will also specify in which area the trust can give out money. There are trusts which:
 - ▶ cover people who live in a single parish or ward such as Blaydon
 - ▶ are only open to people living in Gateshead
 - ▶ cover the whole of the North East
 - ▶ are open to anyone living anywhere in Britain

Handout / Charitable Trusts

- ▶▶ some trust deeds are very specific. The Florence Wilson Memorial Trust will only give money to violin players aged under 21 who live in County Durham and who need money to buy a violin or viola. However, most are more general than this!
- ▶▶ some trusts will pay a weekly amount which would allow you employ a p.a. on a regular basis.
- ▶▶ most trusts don't make regular grants. However, if you can get money to pay for holidays, buy equipment, clothing and other one-off items then you could spend your other money on employing more Personal Assistance.
- ▶▶ in order to get money from a charitable trust you must be in genuine financial need and unable to afford the things that you need. You do not, however, have to be getting state benefits.
- ▶▶ when you apply for money you will have to tell the trust :
 - ▶ your name, address, date and place of birth
 - ▶ your family circumstances (marital status, number and ages of dependent children etc)
 - ▶ your financial position - what money you have coming in, what you spend it on and any debts you have
 - ▶ how did the need arise (disability, loss of job, death of partner)
 - ▶ how much you need and what you will spend the money on
 - ▶ anything else a particular trust needs to know - how long you lived or worked somewhere.
- ▶▶ Information about the charitable trusts which give money to individuals can be read in two main publications :
 - ▶ **A Guide to Grants for Individuals in Need** by John Smyth and Kate Wallace
 - ▶ **The North East Guide to Grants for Individuals** by Funding Information North EastBoth of these books are available in the GPAP library and we can help you to find relevant trusts.

- Write your ideal 'care' package -

Use the information from the self-assessment exercise you did in Session 3 to write your own ideal 'care' package.

We will give you blank copies of the recording sheets we were looking at earlier.

If you want any help at all with this activity just contact GPAP.

Handout / Recording sheet

- Your ideal 'care' package -

	Morning	Afternoon	Evening	Night Time
Monday				
Tasks				
Provided by				
Hours				
Tuesday				
Tasks				
Provided by				
Hours				
Wednesday				
Tasks				
Provided by				
Hours				
Thursday				
Tasks				
Provided by				
Hours				
Friday				
Tasks				
Provided by				
Hours				
Saturday				
Tasks				
Provided by				
Hours				
Sunday				
Tasks				
Provided by				
Hours				
				Total Hours

(shown as half actual size)

- What we have done today -

- ✓ reviewed our Complaints letters
- ✓ identified sources of benefits advice and information
- ✓ identified community care services
- ✓ started to design a care package
- ✓ assessed the assessment process
- ✓ discussed Direct Payments
- ✓ described the Independent Living Fund
- ✓ identified sources of charitable funding
- ✓ Discussed this week's Activity Sheet - design your own care package

- After the break -

Recruiting a personal assistant

- Any Questions or Problems? -



<u>Time</u>	<u>Content</u>	<u>Activity</u>	<u>Resource</u>
12 noon	Outline of today's session	Talk through	OHP
12.10	Feedback from 'Care' package activity	Feedback/talk through	Flipchart
12.30	Introduction to the recruitment process	Brainstorm/Discuss	Flipchart
12.45	Legal requirements	Talk/Discussion	Flipchart/handout
1.00	Lunch	Eating	Food and drink
1.30	Designing a job description	Talk/Discussion	OHP/handout
2.00	Qualities you want/don't want in a pa	Buzzgroups	Paper and pens
2.10	Feedback from pairs	Discussion	Flipchart/handout
2.20	Tea / coffee / orange / water etc	Drink	Refreshments
2.30	The person spec - what are we looking for?	Brainstorm/Discuss	Flipchart/handout
2.50	Application forms	Talk/Discussion	Flipchart/handout
3.20	Tea / coffee / orange / water etc	Drink	Refreshments
3.30	Advertising	Brainstorm/Discuss	Flipchart/handout
3.50	Activity sheets	Talking	Handout
3.55	Summing up the day and next week	Talking	OHP/handout

- Outline of the day -

- ◆ feedback from the care package exercise and arranging one-to-one sessions as appropriate
- ◆ a ten-point guide to the recruitment process
- ◆ what legal requirements are there when you employ someone?
- ◆ lunch
- ◆ designing a job description
- ◆ think of 5 qualities you would want and 5 you **wouldn't** want in a personal assistant
- ◆ the person specification - what are we looking for?
- ◆ producing an application form
- ◆ where do you advertise and what to say
- ◆ this weeks activity sheets
- ◆ summing up the day

- Trainers Question Sheet -

A ten-point plan to recruiting a p.a.

Imagine you've got the money and you want
to recruit a personal assistant -
what are the main things you'd have to do
and get organised?

- A ten-point plan to recruiting a p.a. -

- ① Work out your Personal Assistance needs using the GPAAP guide to self-assessment.
- ② Prepare an application pack to send to people interested in the job. This should contain :
 - a job description - what you want your p.a. to do;
 - a person specification - the qualities you want a p.a. to have;
 - the main terms of employment - the pay, the hours you want them to work, holidays and so on;
 - an application form - for people to provide you with details of their experience.
- ③ Advertise the job.
- ④ Deal with enquiries and send out application packs with a covering letter giving dates for returning forms and for interviews.
- ⑤ Make a shortlist of the people you want to interview and let them know.
- ⑥ Prepare for the interviews - where will you hold them, do you want someone with you, what questions will you ask?
- ⑦ Conduct the interviews.
- ⑧ Send off for references and check their immigration status.
- ⑨ Make a decision - notify the successful and unsuccessful candidates.
- ⑩ Arrange a start date!

- Discrimination in Employment -

Discrimination law

If you are recruiting a personal assistant you must not, by law, discriminate against someone (treat them less favourably) because of their sex, race or disability.

Put simply you cannot generally refuse to employ someone because they are, for example, a man, because they are black or because of an impairment.

Good Practice

It is also good practice not to discriminate against someone simply because of their :

- » age
- » marital status
- » sexuality

As Disabled people we suffer from discrimination on a daily basis - poor access, inadequate housing, not enough money, abuse from people. We need to make sure that we don't also discriminate against people when we employ them.

Don't

When you are thinking about the type of person you want to employ :

X don't make assumptions :-

people who are married or have children can still be flexible about the hours they can work.
older people can still manage physical tasks.

X don't ask for skills you don't actually need :-

if you don't need a driver, don't ask for a clean driving licence.
do you need someone who can read?

Genuine reasons

Of course, there may be genuine reasons why you are asking for certain skills or attributes :

- ✓ your van insurance only covers people aged over 25
- ✓ you need help with the post and with paying bills so someone must be able to read

Genuine Occupational Qualifications

The Sex and Race Discrimination Acts also do allow you to discriminate where there is what is called a 'Genuine Occupational Qualification'.

Where a personal assistant is going to be working or living in your own home, and will be having a close degree of physical or social contact with you, then you can argue that you only want someone of the same sex to do that.

It is also accepted that in some cases, people will object to someone of the same sex doing this kind of work. Say a man who doesn't feel comfortable having another man assist him.

If this genuinely applies to you, then you can specify in your advert that you want only male or female staff.

Similarly, it may be that someone of a specific racial group would prefer that someone who provides them with personal services comes from the same racial group as them. This would probably only be reasonable where the person has, for example, very specific religious, dietary or cultural needs.

Don't ever choose simply on the grounds that, for example :

- X you don't like the look of someone
- X cleaning is womens' work
- X a woman wouldn't be strong enough

- Immigration status -

Since January 1997, it has been a criminal offence to employ someone who is not entitled to live or work in the United Kingdom. It is the responsibility of the employer to make sure that the person they employ has a legal right to work here.

You can do this by asking to see **one** of the documents listed below. You should make and keep a copy of any document you are shown.

- ① any document which shows both the person's name and their National Insurance number and which has come from:
 - a previous employer
 - the Inland Revenue
 - the Benefits Agency
 - the Contributions Agency
 - the Employment ServiceAcceptable documents include:
 - ✓ a P45
 - ✓ a P60
 - ✓ a Pay Slip
 - ✓ a National Insurance Numbercard
 - ✓ a letter confirming the person's name and their NI number
- ② a passport confirming that the person is either
 - a British citizen
 - a national of a country in the European Union
 - otherwise entitled to live and work in the United Kingdom
- ③ a Birth Certificate confirming that they were born in the United Kingdom or the Republic of Ireland.
- ④ a letter from the Home Office confirming that the person is allowed to work in the United Kingdom.

You only need to see **one** of the above documents and they are all equally valid.

You must **never** refuse to consider employing someone because they look or sound foreign - this is unlawful.

- Trainers Question Sheet - Designing a job description

What is a job description?

Why should you have a job description?

What kind of things would you include in it?

- Designing a job description -

Your job description will describe what the job of personal assistant is about and will contain information about all the major tasks that you want them to do.

It should help to avoid the situation where a personal assistant complains that they didn't realise something would be part of the job.

- ➡ general introduction to the job
- ➡ you are the boss!
- ➡ general idea of the work involved
- ➡ p.a. must be flexible
- ➡ your personal needs
- ➡ your domestic needs
- ➡ any other needs
- ➡ how training will be provided
- ➡ list of the p.a.'s general responsibilities

- Designing a job description -

It is important that anyone thinking of applying for the job of personal assistant understands what the job involves. The job description will describe what the job is about and will contain information about the major tasks that you want them to do.

It should help to avoid the situation where a personal assistant complains that they didn't realise something would be part of the job.

A job description can be as long or as short as you want it to be. It would usually be more detailed for a live-in assistant than for someone working for just two hours per week.

We have produced an example (1) to give you an idea of what could be included in your job description. You should adapt it to suit your needs - pick and choose the things that are relevant to you and add anything we haven't covered.

If you prefer, you can produce a job outline which, as well as describing your Personal Assistance needs, includes some information about yourself. See (2) for an example of one of these.

Don't forget: when you are ready. GPAP can help you to write and print your own job description - get in touch.

- Example 1 -

Personal assistant job description

It is the job of a personal assistant to enable me, a Disabled person, to carry out personal, domestic and social activities, both at home and in the community.

My personal assistant will work under my direction to meet my needs for physical assistance. They should always ask first what my needs are and should always listen to and act on my requests and directions.

My personal assistant should be able to handle the physical tasks of hoisting, handling, pushing and bending. My personal assistant does not need to be physically strong to do the job well. However, good general health is important.

Handout / Designing a job description

The work involves providing assistance with the following tasks. Some tasks are daily, others weekly or monthly.

As my needs will vary it is important that the personal assistant is flexible about what the work involves and agrees to undertake any other reasonable Personal Assistance tasks that I request.

➡ **Personal needs**

- ☐ transfers to and from bed using a hoist
- ☐ positioning and turning in bed and wheelchair
- ☐ assistance in taking medication - no special knowledge required
- ☐ toileting, including changing and emptying a drainage bag and bowel management
- ☐ washing and bathing, in bed and in the bathroom
- ☐ teeth, skin, feet, nails and hair care
- ☐ shaving
- ☐ menstrual care
- ☐ dressing and undressing
- ☐ eating and drinking
- ☐ physiotherapy exercises and movement of limbs

➡ **Domestic needs**

- ☐ preparation and cooking of meals and drinks
- ☐ setting up cooking materials for me to use
- ☐ shopping and/or assistance with shopping
- ☐ opening the post
- ☐ setting up reading and writing materials
- ☐ setting up my computer
- ☐ filing and mailing correspondence
- ☐ fetching and carrying
- ☐ making and changing beds
- ☐ general household tasks such as washing up, laundry, ironing, storing, hoovering, dusting and cleaning
- ☐ collection of benefits and prescriptions

➡ Other needs

- ☐ assisting me to look after my children
- ☐ assistance in and out of my car
- ☐ driving and escorting me to meetings and social activities, including visits to the pub, theatre and cinema
- ☐ simple maintenance (oil, water, cleaning etc.) of my van/car
- ☐ pushing my wheelchair on walks, local trips
- ☐ charging and general maintenance of my wheelchair and other equipment such as my hoist
- ☐ general maintenance of the outside of my house such as clearing snow, leaves and ice
- ☐ light gardening duties
- ☐ reading to me

➡ Training

There are no formal qualifications needed to do this job. For the most part the tasks and assistance involved can be learned through myself and the personal assistant working together. I am the person best qualified to know what my needs are and how they are best met.

Where it is required, such as in Health and Safety matters, practical training and guidance will be arranged and the personal assistant will be expected to attend.

The personal assistant has a general responsibility to :

- ✓ arrive at the agreed time, ready to work;
- ✓ give as much notice as possible if you are going to be late or can't come at all;
- ✓ discuss any problems with me as soon as possible so that we can try and resolve them before they become a major issue;
- ✓ be as open as you can in your dealings with me;
- ✓ respect my privacy and treat everything you see, hear and do as confidential;
- ✓ understand the importance of preserving my dignity and independence in our working relationship;
- ✓ not question or undermine my decisions;
- ✓ respect my possessions and equipment and to use them only with my prior consent;
- ✓ respect my relationships with family, friends and visitors and to understand that they should only join in at my invitation.

- Example 2 -

Personal assistant job outline

Introduction

I broke my neck in a traffic accident 30 years ago when I was 20. I have little movement or sensation below my shoulders. I can however move my arms but have no sensation or movement in my hands.

I am able to do many things around the house but I do require assistance with most aspects of daily living. I always require someone to be available during the mornings and evenings but, depending on my personal activities, may not always need someone to be around in the afternoons.

I would normally use an electric wheelchair, for which I need assistance getting in and out of, but can control unaided. When necessary, say when I know access will be difficult, I use a manual wheelchair and will require pushing. I have a Possum environmental control system in the house which allows me to use and control a variety of electrical equipment.

I would prefer my personal needs to be met by a female and I need them to be reliable, flexible and to respect my privacy and confidences. I need to take medication at regular intervals throughout the day but this is usually in pill form and requires no special techniques to administer.

Personal needs

Regular

I need turned first thing in the morning, around 8am. I am given my medication and have a drink in bed. Every other day I need suppositories followed, approximately an hour later, by a manual bowel evacuation.

Around mid-morning, I start the process of getting up. Whilst still in bed, I have my lower half washed. I need my skin checked at this point for any red marks indicating pressure. I then have my lower half dressed, which includes changing and attaching my drainage bag.

I need assistance to get out of bed and into my wheelchair using a sling and overhead hoist. I go to the bathroom and have my upper half washed. I brush my own teeth but need assistance with putting toothpaste onto the brush.

Handout / Designing a job description

I then shave. I use an electric razor and can shave most of my face unaided but need assistance to finish off. I am now ready to have my upper half dressed and my hair combed. Lastly, I have my glasses put on.

At lunch time, I need assistance with medication and have a sandwich and hot drink. At intervals, throughout the day, I may need my drainage bag emptied.

About mid-afternoon I have another round of medication, again accompanied by a drink. I like to have my main meal and further medication between 5pm and 6pm and I require assistance with this.

I like to go to bed at about 11pm. Just before this time, I have my final medication and drink for the day. I wash my own face and brush my teeth but, again, I need assistance putting the toothpaste on. I then need my top half undressed and, using the sling and hoist, I am transferred on to the bed. I have my bottom half undressed, my day drainage bag clipped to the side of the bed and the night bag plugged in.

In order to sleep, I need pillows arranging so that I am comfortable. I can usually sleep throughout the night without the need for assistance but there are times when I may need some help.

Less regularly

I would like to have a full bath at least once a week. I have a bath sling and hoist. I like to have my hair washed twice a week. I arrange for a hairdresser to come in and cut my hair every eight weeks. I have finger and toe nails cut as necessary.

I have my drainage changed twice a week. It has happened, rarely, that my bowels don't behave as expected and I would need assistance with cleaning up.

Domestic needs

Once I am up in the morning, I deal with my post. I need the envelopes opened and the correspondence removing but I can physically manage and read my mail.

I use my computer to print letters, envelopes, cheques and so on. I need assistance with preparing items for signing and sealing envelopes and, at times, with changing floppy discs and general fetching and carrying of books and papers to do with projects I am working on.

Handout / Designing a job description

Although not on a special diet I am a fussy eater with very specific tastes (basically I don't like food) and I like to decide what I will eat. However I am not interested in shopping! For all meals, assistance is needed with laying tables, preparing food, clearing away, washing up and storing plates, cutlery, pots, pans etc. I also need Personal Assistance with eating food.

Assistance is needed with all general household tasks such as laundry, ironing, storing, hoovering, dusting and cleaning. I am not a fanatic about tidiness but I like the place to be kept clean.

I own a van and would require driving on a fairly regular basis. I would need simple maintenance carried out on both my van and wheelchair.

Social needs

I like to go out in my van visiting places of interest as often as the mood takes me. I like to visit my local pub, and sometimes to travel further afield, and need assistance with drinking!

I am the chair of a local voluntary organisation and I visit the office on two afternoons a week as well as one evening every two months.

I am interested in military history and would like to travel to other parts of the country to visit museums, record offices and the like.

- The good and bad p.a. -

- ◆ pick a partner
- ◆ decide which of you will take the notes

You have ten minutes to :

- ◆ write down 5 good qualities you would look for in a personal assistant
- ◆ write down 5 bad qualities you wouldn't want in a personal assistant

When we come back together be ready to tell us what you have written down on your list

- Trainers Question Sheet -

Writing a person specification

Does anyone know what a
person specification is?

Why should you have a
written person specification?

What kind of things would you
include in your person specification?

- Person Specification -

Once you have written your job description, you need to decide what are the minimum experience and skills someone would need to be your personal assistant.

You should also consider what other qualities would be desirable.

These should be written down as a 'Person Specification', and the list can be sent, along with the job description, to anyone interested in the job. It will quickly tell them whether they have the skills and qualities necessary to do the job.

Only include those skills and qualities which are necessary to do the job. For example, don't ask for reading and writing skills if you don't need someone to assist you with those tasks.

Make sure that you don't discriminate against someone because of their age, gender, race or disability. You may need to specify a minimum age for insurance purposes but you shouldn't have a maximum age limit.

If your personal assistant will be assisting you with your personal needs in your own home then it may be legal under the Sex Discrimination Act to specify whether you want a man or woman, but make sure that you have a genuine reason for doing so.

We have produced an example below of some of the things you could include. They may not all be relevant to your situation or you may want to add some others.

- Example -

Personal assistant person specification

To be my personal assistant you should :

- ➔ be willing to work under my direction
- ➔ be flexible
- ➔ not smoke in my presence
(if you object to smoking)
- ➔ not eat meat in my presence
(if you object to meat eating)
- ➔ not drink alcohol when working for me
- ➔ be a driver and have a clean driving licence
(if you require a driver for the job)
- ➔ be aged over 25
(only include this if ,say, your van or car insurance has a minimum age requirement for the driver)
- ➔ have good general health
- ➔ not be squeamish
- ➔ be reliable and trustworthy
- ➔ be a good timekeeper
- ➔ be able to keep a confidence
- ➔ be able to accept responsibility and work on your own
- ➔ have at least basic reading, written and number skills
(if these skills are needed to do the job)
- ➔ be able to commit yourself to giving at least 2 months notice before leaving the job, except in extreme circumstances

You do not need any formal qualifications but you must be willing to learn how to do the job under my direction.

- Trainers Question Sheet -

Deciding who to interview

Let's assume you've advertised your job
and people get in touch with you.

How will you decide who you want
to interview?

What kind of questions would
you ask them?

Would you ask questions over the phone?

Would you use an application form?

- Application form questions -

How will you decide if someone is at all suitable to be a personal assistant and worth interviewing?

The simplest way is to send them an application form to fill in. This will give you some basic information about their skills and experience.

You should ask:

- ◆ For personal details, name, address etc
- ◆ When are they available for work?
- ◆ Do they have the skills you need - driving, gardening, reading, writing?
- ◆ Are they prepared to carry out more intimate, personal tasks?
- ◆ Are they bothered by pets, smoking, drinking alcohol, loud music?
- ◆ Do they have any relevant medical or mental health problem(s) ?
- ◆ What do they think the job involves?
- ◆ Have they done this or other jobs before?
- ◆ Have they been in trouble with the police?
- ◆ For the names of two referees.
- ◆ When could they start?

- Application form -

Once people have read the Job Description and the Person Specification they will be able to decide whether they are interested in applying for the job.

How will you decide if they are at all suitable and worth interviewing?

The simplest way is to send them an application form to complete which will give you some basic information about their skills and experience.

It is good equal opportunities practice only to ask the applicant for information which is directly relevant to their ability to do the job. If they don't need to drive, don't ask if they have a driving licence; you may need to know if they can work evenings and weekends; you don't need to know if they have children; you certainly don't need to know if they are married.

Because of the personal care nature of the work, you are entitled to ask someone whether or not they have any criminal convictions and to take that information into account when deciding whether to employ someone. For most other jobs, this is not the case and a person does not have to tell an employer about their criminal convictions once a certain period of time has gone by.

You **must** keep confidential any information that you are given. You should **only** choose not to consider someone if their conviction is relevant to their ability to do the job.

Our example should give some ideas of the questions you could ask - remember to leave more space than we have for their answers and don't forget that GPAP can help you to produce a personalised application form to suit your needs.

As with all of our examples, use it as a starting point to decide the questions you want to ask. However, try to resist producing a much shorter application form. The more information you can get at this stage, the easier it is to weed out unsuitable applicants.

All this will help at the interview itself. If you already have most of the important information from your form you can spend more time finding out about their attitudes and how you might get on with them.

- Example of an Application Form -

(remember to leave an appropriate space for the answers)

Application for the job of personal assistant

Please answer all the questions. Where the question has a choice of ☐ boxes, please tick (✓) all the ones that apply to you. Please be honest - answering 'no' to any question will not necessarily stop you getting the job.

- ◆ Name
- ◆ Address
- ◆ Do you have a telephone at home? ☐ yes or ☐ no
- ◆ Telephone number I can contact you at
- ◆ What is your age?
- ◆ Are you ☐ male or ☐ female?
- ◆ Do you have a current clean driving licence?
☐ yes or ☐ no
- ◆ I am putting together a team of personal assistants. Which of the following sessions would you be able to work? Please tick (✓) all the boxes that you could work.
 - ☐ weekday mornings ☐ Sat mornings ☐ Sun mornings
 - ☐ weekday afternoons ☐ Sat afternoons ☐ Sun afternoons
 - ☐ weekday evenings ☐ Sat evenings ☐ Sun evenings
- ◆ Would you be able to sleep-in at my house overnight?
☐ regularly ☐ occasionally ☐ never
- ◆ Could you work extra hours at short notice? ☐ yes or ☐ no
- ◆ I need assistance with very intimate tasks such as toileting, washing, dressing and eating. Would you be embarrassed?
☐ yes or ☐ no
- ◆ Which of the following household tasks can you carry out?
Please tick (✓) all the boxes that apply.
 - ☐ cooking ☐ washing clothes ☐ hoovering
 - ☐ preparing food ☐ light gardening ☐ ironing

Handout / The Application Form

- ◆ Sometimes I would want assistance with form filling, paying bills, shopping. Are you able to :
 - Read? ☐ yes or ☐ no
 - Write? ☐ yes or ☐ no
 - Do simple arithmetic? ☐ yes or ☐ no
- ◆ I have a cat/dog/gerbil. Would you be able to help me look after it?
☐ yes or ☐ no
- ◆ Would you be prepared to work in a house where smoking is not permitted? ☐ yes or ☐ no
- ◆ Would it bother you if I drank alcohol? ☐ yes or ☐ no
- ◆ Please tell me if you have any medical or mental health problem(s) which may affect your work as a personal assistant in any way
.....
- ◆ Please tell me if there are any Personal Assistance tasks that you think you couldn't perform, either for religious, cultural or medical reasons or just because you wouldn't want to
- ◆ What skills and qualities do you think you would need to be a personal assistant?
- ◆ Have you worked as a personal assistant before? ☐ yes or ☐ no
- ◆ If yes, please tell me the employer's name and address
- ◆ Tell me, briefly, why you want to work as a personal assistant
.....
- ◆ Please tell me, briefly, about your recent experience of work (paid and unpaid) and/or study
- ◆ Have you ever been in trouble with the police?
(because of the nature of this job, it is exempt from the Rehabilitation of Offenders Act and you must tell me about any previous convictions which you may have had at any time. Any information you provide will be kept confidential and will **not** automatically stop you from being considered for the job)
- ◆ If you were offered the job, when would you be able to start?
.....

Handout / The Application Form

- ◆ Please provide me below with details of two people that I can ask for a reference about you. One should be a current or most recent employer if you have one. They should not be a member of your close family.

Name:

How do they know you?:

Address:

Tel no:

Name:

How do they know you?:

Address:

Tel no:

I will only contact the referees if *(either)* I am going to ask you to interview *(or)* if I am thinking of offering you a job *(use the option you think is most appropriate)*.

Declaration

I declare that I have answered the questions in this form truthfully and that, to the best of my knowledge, all the information I have given is correct. I understand that, if I am employed and it later becomes apparent that the information is not accurate, I will be dismissed.

Signed:

Date:

Please do not send me any other information, photos, CVs, essays, as I will not be able to consider them.

Please return this form by no later than 30th February to













A Brown
c/o Gateshead Personal Assistance Project
John Haswell House
8/9 Gladstone Terrace
Gateshead
NE8 4DY

- Trainers Question Sheet -

Where to advertise

You've got a job to advertise
- where would you advertise?

- Where to advertise -

-  **Friends and family**
-  **Other p.a. users**
-  **Job Centres**
-  **Teletext**
-  **Gateshead College**
-  **Local newspapers**
-  **Newsagents**
-  **Shops and Supermarkets**
-  **Library**
-  **Churches**
-  **The Lady**
-  **Recruitment Agencies**

- Where to advertise -

🚲 **By word of mouth**

Ask friends, family, other people who use personal assistants, work and social colleagues to spread the word that you are looking for staff. They may already know someone who would be interested in applying.

🚲 **Gateshead College**

You can advertise your job on notice boards in the college. A large number of students, attending full-time and part-time courses and covering a wide age range, attend the college. Most of them will be keen to earn money and many will be willing to learn new skills, so the College is often a good source of potential personal assistants.

Send your advert to the college, with a covering note asking them to display it, at the following address :

Gateshead College
Durham Road
Gateshead
NE9 5BN

🚲 **Job Centres**

The Job Centres in Gateshead (tel: 451 6800), Birtley (tel: 451 3500), Blaydon (tel: 451 6900) and Felling (tel: 451 4149) will place your advert in their display racks free of charge. They do sometimes rewrite adverts to fit the house style so try to make sure that they understand the job you are offering - you are not looking for a nurse to care for you!

You can phone, fax or post your advert to the Job Centre but if you can, it's usually best to visit. You can then discuss your requirements and make sure the advert says what you want it to.

🚲 **Local newspapers**

The Evening Chronicle, Gateshead Post and the free papers all carry job adverts. You will have to pay for the advert, per word, so make sure you keep it as concise as possible. Details of how to advertise are in each newspaper.

🚲 **Notice boards**

All the large supermarkets (Tesco's, Safeway's, KwikSave) have notice boards where you could advertise your job free of charge. Local shops, newsagents and Post Offices will often display small adverts for a small fee.

🚲 **Recruitment Agencies**

They will find you a worker for a fee. This can work out expensive and there is no guarantee that they will find you someone suitable.

- Anything wrong with this? -

Please help me!
Carer wanted to look after
severely disabled woman.

Wages negotiable.

All hours required.

Anyone considered.

Contact : Mary Brown,
12 Sunnyside, Gateshead
at anytime.

- Design an advert -

An advert does not have to say everything - you can tell people more later. Basically, you want a short message which attracts attention and gives enough information to attract the right applicants.

An advert should tell people:

- ✧ what the job is, the general duties you expect;
- ✧ how much you are paying;
- ✧ how many hours you are offering and when;
- ✧ who to contact for further information.

You might also want to include things that you specially require from a worker, for example:

- ✧ “must have a clean driving licence”
- ✧ “woman wanted”
- ✧ “non-smoker essential”

or things you don't want, for example :

- ✧ “no experience necessary”

For your own safety, an advert **should not** tell people:

- ◆ your home address. GPAP will act as a free mailing address for you or you can arrange for a PO Box number with the Post Office;
- ◆ your full name - use your initial(s).

Phone numbers - there are advantages and disadvantages to giving your home phone number in an advert. You get to talk to people and can usually quickly tell those people who have the wrong idea about the job - that could save you the cost and effort of sending out your Application Pack.

The disadvantages are that you can't choose when you will deal with the applicants - people can ring you at any time. You may also receive some crank calls.

- Session 6 / Recruiting a personal assistant : 9.31**

- What we have done today -

- ✓ developed our Care packages and arranged one-to-one sessions
- ✓ identified the stages involved in the recruitment process
- ✓ discussed the legal requirements around sex, race and disability discrimination
- ✓ designed a standard job description
- ✓ identified good and bad qualities to look out for in a p.a.
- ✓ designed a person specification
- ✓ drawn up an application form
- ✓ identified what makes a good advert and compared the merits of different places to advertise
- ✓ Discussed this week's Activity Sheet - 'write an advert for a p.a.' and 'prepare a list of interview questions'.

- Next week -

Interviews and Contracts

- Any Questions or Problems? -



Planning Sheet / Session outline

<u>Time</u>	<u>Content</u>	<u>Activity</u>	<u>Resource</u>
12 noon	Outline of today's session	Talk through	OHP
12.05	Re-cap of session 6	Talk	OHP
12.10	Feedback from advert activity (6)	Feedback/talk through	Flipchart
12.20	Shortlisting	Brainstorm/Discuss	Flipchart/handout
12.30	Preparing for the interview	Brainstorm/Discuss	Flipchart/OHP
12.40	Interview questions - feedback from activity 6	Feedback/talk through	Flipchart/handout
1.00	Lunch	Eating	Food and drink
1.30	How to interview	Video/Discussion	Video/Flipchart
2.00	Making a decision	Talk/Discussion	OHP/handouts
2.10	References	Talk/Discussion	OHP/handouts
2.20	Tea / coffee / orange / water etc	Drink	Refreshments
2.30	Main terms and conditions	Brainstorm/Discuss	Flipchart/handout
2.45	Written statement	Brainstorm/Discuss	Flipchart/handout
3.15	Disciplinary and Grievance procedures	Brainstorm/Discuss	Flipchart/handout
3.20	Tea / coffee / orange / water etc	Drink	Refreshments
3.30	Covering yourself : health & safety etc	Talk/Discussion	Flipchart/handout
3.50	Activity sheet	Talking	Handout
3.55	Summing up the day and next week	Talking	OHP

- Outline of the day -

- ◆ Re-cap of where we are up to
- ◆ feedback from the advert exercise
- ◆ shortlisting- deciding who to interview
- ◆ preparing for the interview
- ◆ questions to ask at an interview -
feedback from your activity sheets
- ◆ lunch
- ◆ how to interview - discussion and
video
- ◆ making a decision and following up the
successful and unsuccessful
candidates.
- ◆ asking for references
- ◆ contracts of employment
- ◆ disciplinary procedures
- ◆ cover yourself - insurances, health and
safety
- ◆ activity sheets - produce a simple
person specification
- ◆ summing up the day

◆ What we've already done ◆

- ✓ Worked out your Personal Assistance needs
- ✓ Looked at the legal requirements
- ✓ Designed a job description
- ✓ Drawn up a person specification
- ✓ Produced an application form
- ✓ Advertising the job

◆ What we'll do today ◆

- ✓ Feedback on your adverts
- ✓ Deciding who to interview
- ✓ What questions to ask at interview
- ✓ Preparing for the interview
- ✓ How to interview
- ✓ Making the decision
- ✓ Follow up
- ✓ Writing a contract of employment

- Advert feedback -

We asked you to imagine
you were advertising
for a personal assistant.

What did you come up with?

- Shortlisting : who to invite to interview -

If your advertising has worked, you should have a number of completed application forms from people interested in the job. Your first task now is to decide who you should invite to interview.

The interview allows **you** to find out :

- ? if they can do the job
- ? see whether or not you can get on with them

An interview allows **them** to :

- ? find out more about what the job involves
- ? decide whether they could work for you.

You will almost certainly have a number of unsuitable application forms. Some people will not meet your essential requirements. For example, they :

- X are too young
- X can't work the hours you need
- X can't drive
- X don't like cats
- X haven't answered all the questions

Other people clearly will not have understood what the job is about.

You do not want to waste your time or theirs by inviting them for interview, so these forms can be put to one side.

This will leave you with a smaller pile of people who it might be worth asking to come to a interview.

If you feel that there are still more people than you would want to interview, look again at your job description and remind yourself of the skills and qualities you want in a personal assistant. Then go through the pile of applications again, pulling out only the ones that meet all your requirements and that you definitely want to interview.

If no one seems suitable, don't feel that you have to interview someone. That will be a waste of your time and theirs. Re-advertise.

You might find it helpful to do the shortlisting with someone else. GPAP can help you to arrange this.

- Preparing for the interviews -

- decide where you are going to do the interviewing. If you are going to do it in your own home, make sure that someone else is present. If you would prefer, GPAPP has an accessible room that you can use.
- have an interview plan - prepare your set of questions.
- prepare an interview checklist (see the handout 'How to Interview') to keep a score of how you feel about each candidate.
- allow yourself plenty of time for each interview, say an hour. You will need time to:
 - ✓ re-read each person's application form before you meet them to remind yourself about the person's skills and experiences;
 - ✓ ask them your pre-arranged interview questions;
 - ✓ at the end, add up their interview scores and write down your immediate thoughts;
 - ✓ recover before meeting the next person!
- decide the order and times you want to interview people and contact them to confirm this. If you can, it is probably best to do this by phone in case you need to re-arrange the times with them. Follow up the phone call with a letter confirming the time and giving details of the place and how to get there.
- decide whether to have a formal interview, sitting at a table going through the questions, or to be more informal, asking the questions over a cup of tea. The informal method may tell you more about whether you will get on with each other and will help them to feel relaxed.
- on the day, try to make sure that there are no interruptions. If you have someone else with you, they can deal with door and phone answering.

Remember :

- interviewing is tiring.
- don't take on too many interviews at once
- leave yourself plenty of time between each interview
- if you don't feel up to it, re-arrange the interviews

- Interview Questions -

We asked you to think about
the questions you would ask
a personal assistant
at an interview.

What did you come up with?

- Sample interview questions -

Don't forget, you have already asked most of the practical questions on the application form so it is not generally worth repeating them in the interview. Use the interview to ask more general, discussion type questions.

However, on re-reading a person's application form, there may be a specific point(s), say about their health or experience, that you want to explore further with them.

You can add that type of question to your general list that you ask everyone.

- ? What has been your best job and why
- ? What has been your worst job and why
- ? What interests you about the job of personal assistant
- ? What kind of training do you think you would need to do this job
- ? Have you worked or studied with any Disabled people - if yes, tell me more about it
- ? If we were out shopping together and someone asked you in my presence what was wrong with me, what would you say
- ? If one of my other p.a.'s was ill, would you be able to cover for them
- ? What's the longest time you've ever worked at one job
- ? Describe your ideal job
- ? If I asked you to accompany me to a restaurant with some friends, who do you think should buy your meal
- ? If we were out driving and my car broke down, what would you do
(you are looking for an answer that shows the person understands they would work under your instructions, even in an emergency situation)
- ? Why do you think that you would make a good personal assistant
- ? Do you mind working for a trial period of 1 month

Handout / Sample Interview Questions

- ? Describe your ideal employer
- ? Are there any duties that you would feel uncomfortable performing
- ? What is the longest you have ever been away from work due to illness
- ? Describe a situation that has changed the way you think about a particular issue
- ? Are there any questions that you would like to ask me

You can ask people to expand or give you more information about any of their answers.

You should also ask specific questions about anything in their application form which concerns you, such as criminal convictions, ill health and so on.

How to ask questions at an interview

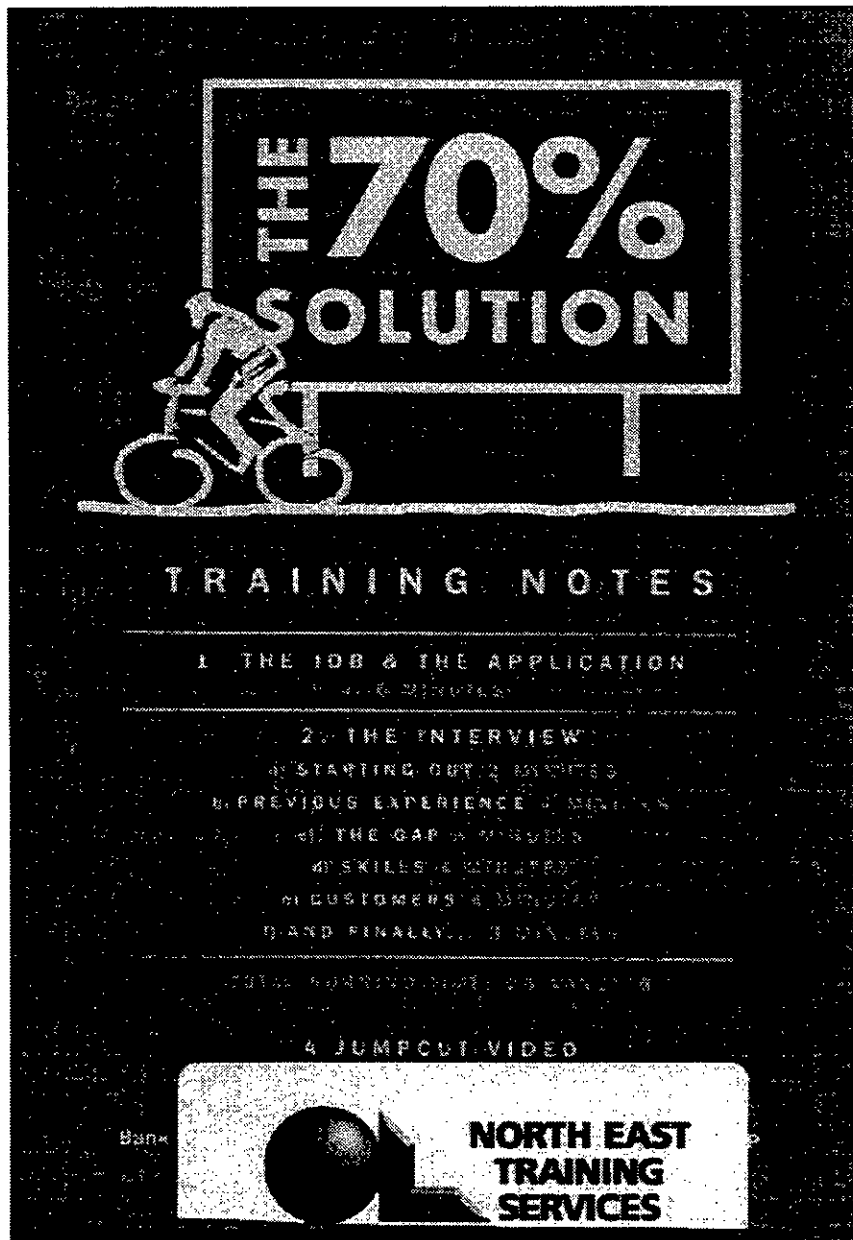
- ? You are in charge of the interview - don't be afraid to cut them off or to ask awkward questions.
- ? If you don't ask, you won't get an answer. There are no unanswered questions - just unasked questions.
- ? If you have any doubts about anything they've said, either at the interview or written in the application form, tell them. There could be a simple explanation.
- ? You want to know what they think - don't let them know your own opinions.
- ? Don't answer your own questions. "Why did you leave your last job? Was it the money?"
- ? Don't use leading questions. "This job involves a lot of cleaning. Could you cope?"
- ? Use open questions, such as "Tell me about" and "Give me an example of".
- ? Avoid using closed questions which can only be answered "yes" or "no" unless you are asking a simple factual question.
- ? Use probing questions which start "when", "how", "why", "what".
- ? Try asking the opposite of what they tell you. If they tell you they like working with people, ask them how they would deal with lots of cleaning.
- ? Don't ask more than question at once. "What was your last job and did you enjoy it?"
- ? If you're not happy with an answer or didn't understand it, ask them to repeat it.
- ? If you think they are being evasive when you ask a question, ask again and probe. They might be hiding something.
- ? Check out any gaps in their employment history.

- The 70% Solution -

This video shows a young women being interviewed for a job at a DIY store. It provides a commentary from the interviewee and interviewer as to what they thought, respectively, of the questions and of the answers.

Although obviously not strictly relevant to employing a personal assistant it is the best video we have found for explaining the process and showing the human side of an interview.

The 70% Solution? The video argues you will never get everything (100%) you want from a job applicant so be prepared to accept 70%.



- Making a decision -

In order to make a decision about who to employ, you need to consider :

- what they put on their application form
- what they said at the interview
- how they related to you
- your instincts and gut feelings
- do you feel you can trust this person?

- ⇒ If you have asked each person being interviewed the same (or broadly similar) questions, you can use a simple chart to give them a score (say out of 5) for each answer. The better the answer, the higher the score.
- ⇒ You can also give them marks for, say, presentation, compatibility and general manner. Interviewing isn't a science and you should trust your instincts on this - if you feel uneasy about someone, give them a low mark and don't employ them.
- ⇒ This system should give everyone being interviewed an equal chance and, when you add up the final scores, gives you a quick and fairly reliable way of comparing the people you interviewed.
- ⇒ If you are asking everyone a range of different questions, keep a brief note on a piece of paper of key things they said and what you felt about them.
- ⇒ It also helps to write down something that will remind you who they were at the end of the day. After a few interviews, it becomes surprisingly difficult to put names to faces and to remember who said what. Compare the different answers at the end.
- ⇒ For you, listening and noting down answers during the interview should be more important than talking.
- ⇒ Keep all your notes that you make during the interview - they will help you to come to your decision. They will also help you later if someone asks you why they didn't get the job.

Handout / making a decision

- ↳ There are some things which may exclude them from the job altogether. Someone who patronises or talks down to you during the interview or is clearly prejudiced, either about Disabled people or anyone else, should not be considered.
- ↳ You should always aim for the “100% right” candidate. But the reality is that often “70% right” is good enough.
- ↳ At the end, thank the person for coming in and tell them when you will contact them with your decision. You should always notify everyone who comes for interview, whether or not they have been successful.
- ↳ If you are interviewing for the first time and would like some support, a GPAP worker will talk you through it beforehand and, if you wish, sit in on the interview with you.

- Contacting the candidates -

When you have made your mind up, you need to contact the successful candidate.

At the point you make a firm offer of a job to someone, legally you are contracted to employ them (or compensate them if you later change your mind).

You therefore need at this stage to be careful that you are not committing yourself to employing someone before you have all the information you need.

It is best to proceed as follows :

- Ring up and offer them the job. Tell them that the offer is subject to you :
 - ✓ receiving satisfactory references about them
 - ✓ having their national insurance number or otherwise confirming their immigration status
 - ✓ agreeing the details of the job, hours, holidays, etc with them
- check their references
- confirm their immigration status
- meet with them to discuss their terms and conditions
- fix up a start date

Stand-by list

You might also want to think at this stage about setting up a stand-by list of people that you can call on at holiday times or in an emergency.

You could phone candidates that seemed generally OK and explain that, whilst they weren't the successful candidate, you thought they were still of a very high standard. Tell them that you are setting up a stand-by list and would they mind being contacted for p.a.work in the future, sometimes at short notice.

Unsuccessful candidates

Finally, the difficult bit, contacting the totally unsuccessful candidates.

You'll know from your own experience what it's like waiting to find out whether you've been successful or passed something. So if you can, contact people as soon as possible with the bad news.

If you are phoning, say something like this :

"Hello Emma, this is Bob Smith. Thank you for coming to the interview yesterday. I enjoyed meeting you. Unfortunately, I am not able to offer you the job as I have offered it to someone else whose skills were best suited to my needs. Thank you again for your interest in the job."

If you prefer to write , write something similar.

- Trainers Question Sheet -

References

What are references?

Why do we ask for them?

Should you always ask for them?

What kind of things do you want
a reference to tell you?

At what point in the process would you ask for them?

- References -

Your decision about whether or not to employ someone will be helped by asking them for the names and addresses of people who can give you a **reference** about them.

A reference should be able to tell you:

- ? whether the person is reliable, did they turn up on time;
- ? whether the person is honest and trustworthy;
- ? whether or not there were any problems;
- ? how well they did in their previous job or course;
- ? how much they got paid.

You should also ask whether the person would be suitable for the job of personal assistant. However, don't rely solely on someone else's judgment - your view of how they come across in the interview is the most important.

You should ask for 2 references. If they have worked before, you will want details of their current or most recent employer. If the person has never had paid work, then you would want a reference from someone who knows them through their school or college, voluntary work or similar.

Key points

- ① ask for the names and addresses of 2 referees;
- ② get the applicant's permission before you follow up references - you can do both these things on your application form ;
- ③ use a standard format to request references;
- ④ you can get references in advance for everyone you decide to interview

or

you only get references for the person or people you would consider offering the job to. In this case make sure that any job offer you make is "subject to satisfactory references" ;

- ⑤ when you send off requesting a reference, enclose a stamped addressed envelope for their reply;
- ⑥ enclose a copy of the job description;
- ⑦ if you need a quick reply, tell them why.

- Example of a reference request -

Your contact address

(this need not be your home address - you could use GPAP)

Today's date

Confidential

Dear A N Other

Reference for (name) of (address)

The above named person has applied to work for me as a personal assistant.

They have given me your name as someone I can ask for a reference regarding their suitability for the job.

I would therefore be most grateful if you would comment on their ability to do the job by completing and returning the attached form to me.

Either :

I am planning to interview them on Wednesday 30th February and your reply before that date would be much appreciated.

Or :

They have been offered the job subject to my receiving satisfactory references. In order that they can start work, your early reply would therefore be much appreciated.

I am enclosing a copy of the job description and a stamped addressed envelope for your reply.

Thank you in advance for your help in this matter.

Yours sincerely

B Jones

- Sample Reference Form -

(leave enough space for people to provide answers)

Name of applicant: (name)

1. In what capacity do you know the applicant and how long have you known them?
2. What tasks did they carry out while they were employed, studied or volunteered with you?
3. If they worked for you, what was their pay?
4. How would you describe the applicants:

Honesty -

Ability to handle money -

Timekeeping -

Sickness record -

Disciplinary record -

5. Did you have any performance or conduct problems with them?
6. This job is exempt from the provision of the Rehabilitation of Offenders Act 1974. Do you know of any criminal convictions that the applicant has?
7. How would you describe the applicant's suitability to do the job of personal assistant - please tick (✓) one:

☐ Outstanding ☐ Very competent ☐ Adequate ☐ Unsuitable

8. Please give any further information you think I should know.

Thank you again for your help in this matter.

Signature :

Position :

Date :

- Trainers Question Sheet -

Terms and Conditions

Imagine you are thinking of
applying for a job.

What are the main things that you
would want to know about the job
- the terms and conditions?

Summary of main terms and conditions

As part of the initial application pack that you send to people who are interested in the job, you should include a statement of the main terms and conditions of employment that you are offering.

This can be very brief at this stage and would be expanded when you have chosen a candidate(s) and you provide them with a full written statement.

At the initial stage you would probably want to provide them with the following information :

- Example -

Summary of main terms and conditions

Job Title: personal assistant

Place of work: employer's home, with some travel expected

Duties: see accompanying Job Description

Rate of pay: £5 per hour
(state if varies for evening and/or sleep-over)

Working hours: average of 20 per week

Hours to be worked: by agreement. Some evening and weekend work required.

Holidays: four weeks, two of which are to be taken when employer decides

Accommodation:

(briefly describe accommodation to be provided if person is required to live-in or sleep-over)

Trial period: the offer of any job is subject to a trial period of 13 weeks during which either side may terminate the job with 3 days notice.

(it is important to have some kind of trial or probation period - if either of you feel early on that you've made a mistake, you don't want to continue working with each other longer than absolutely necessary)

Written statement of terms and conditions

Everyone who is employed by you for more than a month is entitled by law to a written statement of the main terms and conditions of their job. This will contain the information that you may have already sent out in your application pack plus some additional points.

Your personal assistant has to be given the statement within 2 months of starting work, and it is good practice to give them a statement as soon as possible after they start work with you.

Having a clear written statement of each others rights and obligations can help to prevent confusion and argument later on.

This written statement forms part of your contract with your personal assistant and you should both have a copy which each of you has signed. Once signed, the statement can only be changed by agreement between the two of you.

GPAP can help you to both produce a 'Written Statement' that suits your needs and to decide on the terms and conditions that you are going to offer in the job. You should not be put off by the legal nature of it.

Information which must be in the written statement

By law, all of the following information must be included in a written statement. It must be given to your personal assistant within two months:

- ✓ **your name** - your name, as the employer.
- ✓ **your p.a.'s name** - your personal assistant's full name.
- ✓ **the job title** - the job title and/or a brief job description. It would be a good idea to refer to and attach the job description to this statement
- ✓ **the place of work** - the normal place of work, usually your home address.
- ✓ **the date the employment began** - the date when your p.a. started work for you

Handout / Written statement of terms and conditions

- ✓ **hours of work** - your p.a.'s normal hours of work per week. You should also include details of their normal work pattern (any rotas or shifts) and whether or not they are required to fill in a time sheet.
- ✓ **pay** - the hourly or weekly pay level. You should include information on any overtime, shift or unsocial hours payments that you may pay. You must pay at least the statutory minimum wage.
- ✓ **when they are paid** - weekly or monthly. You should specify the day as well as the method of payment (eg cheque, cash, giro).
- ✓ **holidays** - how much paid/unpaid holiday is allowed in a year. All employees have the right to at least 4 weeks. However, you can specify when they take that holiday as long as you give them minimum notice of twice the time you want them to take.

Workers do not have any additional legal right to take bank holidays as paid (or unpaid) holidays.

You should specify what counts as a holiday year (from the date they start, from January to December or from April to March are all common) and what notice you require. The law requires a minimum notice of twice the holiday to be taken ie if they want one week they must give you two weeks notice.

You should also consider how you will respond to requests for special leave, say due to bereavement.

- ✓ **sick leave** - what the arrangements are relating to absence and sickness, who to contact and after how many days off and information about your personal assistant's right to sick pay.
 - ✓ **pension** - pension contributions and details of any pension scheme in operation. If there is no pension scheme, you still need to say so.
 - ✓ **length of notice** - the length of notice required to end the contract by either you as the employer or by your p.a. - one month is the usual period although some people ask for two so that they are not left without cover.
- You can also include a reduced amount of notice for any trial or probationary period at the start of someone's employment.
- ✓ **end date** - if the job is temporary or for a fixed term, then you must give details either of the date it will end or for how long the job is expected to continue, for example 12 months.

- ✓ **grievance and disciplinary procedures** - you must give clear information about who your personal assistant should contact (usually you) and what they should do if they have a grievance at work. You should also have a clear written procedure for handling disciplinary matters - where the p.a.'s work or behaviour is not up to the standard you expect. GPAP can help you to write these.

Information you might like to include

The following information isn't required to be written down by law but covers things that you both need to be clear about. Some are legal (also known as Statutory) rights which you cannot change. Others are things that you can decide the policy on.

- ? rules of the house, what is and isn't acceptable to you. For example, smoking, using the telephone, bringing children in to work.
- ? whether food and drink are provided whilst at work.
- ? under what circumstances can your p.a. use your car or their own car for your business.
- ? if an ability to drive is essential then you should include this in the statement and note that if the p.a loses their driving licence they will also lose their job.
- ? what will happen if the p.a. damages your property.
- ? what travel and other expenses are you willing and able to pay and when, for example if your p.a. goes shopping for you.
- ? what the arrangements are for requesting holidays and time off.
- ? you are required by law to take out employer's public liability insurance. You may also need to adjust your or your p.a.'s car insurance. You should include information about insurances in this section and describe whose responsibility it is to provide it.
- ? information on how the contract can be changed. This is usually done by agreement between you and your p.a., but you might want to include something which allows you to change certain terms such as the rotas, duties to be carried out, holiday arrangements, as your needs change.

Handout / Written statement of terms and conditions

- ? training and development of your p.a. You may wish them to attend particular courses such as food handling, lifting, using hoists, disability equality training and attendance at these could be made a term of their employment.
- ? details of how you will review the performance of your p.a. and identify any potential problems. This is sometimes known as 'staff appraisal'.
- ? all employers have a duty to take reasonable care to ensure safety and health in the workplace. As well as informing your p.a. of their rights, you should highlight the need for potential hazards to be reported to you as soon as possible, along with any accidents, however small.
- ? the need for absolute confidentiality between your p.a. and other people regarding information they gain about your private life and finances.
- ? are there any work or outside interests you would not like your p.a. to be involved in? You might want to agree in a contract, for example, that they shouldn't work on night shifts if they are working for you in the mornings.
- ? it is essential that your p.a. is reliable. Include reliability as a contract term as well as details of what procedures your p.a. should follow when they cannot come to work.

Statutory Rights

The following are 'statutory rights' set down by law and you as the employer have to obey them. They don't have to be included in any written statement but you should both be aware of them.

All employees have the right :

- ✗ not to be discriminated against in their employment because of their race, sex or disability.
- ✓ to equal pay for equal work or value compared with a person of the opposite sex.
- ✓ to be given an itemised pay statement, showing their gross pay and what money has been deducted, whenever they are paid.
- ✓ to be paid the National Minimum Wage.

Handout / Written statement of terms and conditions

- ✗ not have to unlawful deductions from their pay. You can only deduct money which you are required to by law, such as tax and National Insurance, or where you have the prior agreement of you p.a. You can not just take money from someone's wages to cover the cost of replacing something they may have broken if it is not included in their contract.
- ✓ to be a member of a trade union, or not to belong to one.
- ✓ to Statutory Sick Pay, when applicable.
- ✓ to maternity benefits and the right to return to work, depending on their length of service.
- ✗ not to be unfairly dismissed, after two years continuous employment, or after any period if dismissal was for a range of specific reasons, including pregnancy or childbirth, or if your p.a. was asserting one of their statutory rights.
- ✓ to notice of termination of employment. Most employees are entitled to receive one week's notice after one month's service, two weeks after two years and an extra weeks notice for each complete year of employment up to a maximum of 12 weeks.
- ✓ to 'reasonable' time off for public and civic duties and to carry out trade union responsibilities. It is 'reasonable' not to give such time off where the organisation is so small or the work of the person so important that you couldn't work without them.
- ✓ to Redundancy Pay, if they have been employed by you for two years or more. The level of redundancy pay they receive is based on your p.a.'s age, their pay rate and the number of years they have worked for you.
- ✓ to ask you for written reasons for their dismissal, where your p.a. has completed at least two years service, unless you have dismissed them because they are pregnant in which case this time limit does not apply.

Working Time Regulations

New regulations were introduced on October 1st 1998 which give workers new legal rights on working hours and holidays.

- ✓ a worker can only be required to work, on average, 48 hours a week unless they voluntarily agree, in writing, that they want to work longer.

Handout / Written statement of terms and conditions

- ✓ a maximum working day of 13 hours for day workers.
- ✓ a limit of an average of 8 hours work in every 24 hours for nightworkers. It is thought that this will not affect workers employed on sleep-overs as time when a worker is on call but asleep does not count towards the 8 hours. Also, 'domestic servants', nurses etc and are generally excluded from the restrictions on working hours.
- ✓ a day off each week (or two days a fortnight). This is unpaid.
- ✓ a right to a minimum rest break of 20 minutes if the working day is longer than six hours. Again this is unpaid.
- ✓ a right to four weeks paid holiday a year from October 1999. Workers, however have no automatic right to take Bank Holidays, paid or unpaid, and these can be included as part of the three/four weeks statutory holidays if you so choose.

In the main, these new working time regulations would be considered good employment practice and you should be offering them as a minimum to your workers.

'Family Friendly' rights

At the time of re-writing this handout (the end of 1999) the government is introducing a number of new statutory employee 'rights'.

These rights may be in place by the middle of December 1999 and will include:

- ✓ unpaid **Parental Leave** of up to three months for mothers and fathers (including adoptive parents) who have worked for you for longer than one year.
- ✓ a right to take unpaid time off for **Domestic Emergencies** concerning dependents.
- ✓ an extended right to paid maternity leave.
- ✓ the extension of full employment rights to part-time workers.

Example of a written statement

You can use a very simple written statement which provides the minimum information required by law :

- ✓ your name
- ✓ your p.a.'s name
- ✓ the job title
- ✓ the place of work
- ✓ the date the employment began
- ✓ hours of work
- ✓ breaks
- ✓ pay
- ✓ when they are paid
- ✓ paid and unpaid holidays
- ✓ sick leave
- ✓ pension
- ✓ length of notice
- ✓ end date
- ✓ grievance and disciplinary procedures

This is straightforward and easy to understand. However, it is usually better to include as much information as you can.

If you have a clear agreement with your p.a. right from the start then disputes should be less likely to happen and easier to sort out if they do.

We have produced an example that you can follow. Some things may not apply to you and, as long as you provide information on all the points listed above, you can leave them out. There may also be other things that you want to include.

The workers at GPAP can help you to put together the written statement that suits you - get in touch when you are ready to employ someone.

Written statement of employment particulars

1. You (name of employee)
began employment with me (your name)
on (date started work)
2. You are employed as a personal assistant
3. Your usual place of work will be at
..... (your address)
You will be required at times to accompany me to other places.
4. Your main **duties and responsibilities** are set out in the attached job description.
5. There will be a **probationary** or trial period of 6 weeks from the date you started.

During the probationary period, employment can be ended by either side giving one week's notice. I may, if I choose, make you a payment rather than require you to work your notice.

At the end of this probationary period, we will meet to review how your work has progressed. If we are both satisfied with the situation, your employment will be confirmed. In the event of difficulties, the probationary period can be extended or your employment ended.

6. Your **pay** will be as follows :

£ per hour Monday to Saturday
£ per hour Sunday and Bank Holidays
£ per night for a sleepover

You will be paid monthly in arrears on the last Friday of the month.

You will be required to complete a weekly time-sheet which I must have by the beginning of the following week.

I may, in addition to any National Insurance and tax that you may be required to pay, deduct from your wages any sums that you may owe me, for example, for breakages.

Handout / Example Written statement of terms and conditions

7. If for any reason I do not require your services, say because I am on holiday or in hospital, I will pay you a retainer of half-pay for up to four weeks, subject to you having worked for me for at least 3 months.

8. Your basic **hours of work** are :

..... Monday to Saturday
..... Sunday
..... sleepovers per week

It is the nature of the job that I may require you to work additional or changed hours. I will always try to give you adequate notice of any changes.

Due to the nature of the work, there is no specified time for taking a break or rest whilst on duty. However, reasonable time will be given (at least 20 minutes for every 6 hours worked), depending on the hours you are working and my needs for assistance.

9. You must phone and advise me as soon as possible if you are likely to be more than ten minutes **late** for your shift. Persistent lateness will result in your dismissal from the job.

10. You are entitled to four weeks **paid holiday** per year . A holiday week is the equivalent of the number of hours or days you would normally work for me per week.

The holiday year runs from 1st January to 31st December. In the year you leave or start work for me, you will be entitled to 1/12th of your annual entitlement for each full month you have worked for me.

Two weeks of your annual paid holiday must be taken when I decide and two weeks are taken when you choose.

We must give each other at least 4 weeks notice of when holidays are to be taken.

All Bank Holidays are treated as normal working days and you must book leave if you do not want to work on those days.

11. Because of the nature of your work as my personal assistant, I am unable to give you **paid time off for public duties**.

Handout / Example Written statement of terms and conditions

- 12.** If you are unable to come to work because you are **sick** you must :
- (a) inform me as soon as you know you are unable to come to work so that I can make other arrangements.
 - (b) if you are off sick for more than 3 days, fill in and send me a form SC2 (Employee's Statement of Sick Leave), which you can get from a Post Office.
 - (c) I may ask you for a medical certificate if you are off sick for more than 7 days, and thereafter at weekly intervals for the first month, and then at fortnightly intervals .

Statutory Sick Pay will be paid if you are eligible according to the scheme's regulations and you have followed the above procedures.

- 13.** Your employment is permanent, subject to section 12 below.
- or** Your employment contract is for a fixed term and it ends on (give a date, usually when your funding is reviewed)
- or** Your employment is temporary and is expected to continue for (how long you think the job will last)

- 14.** You must give me 6 (six) working weeks **notice** if you plan to leave the job.

Except in the case of gross misconduct, I will give you 6 (six) working weeks notice or the statutory minimum notice required by law (whichever is greater) if your job is to end before any date given in section 11.

- 15.** There is no **pension** scheme attached to this job and you should make your own arrangements.
- 16.** You must **respect my privacy** at all times. You must keep any and all information you gain about me during the course of your employment confidential. You should not discuss my personal, household, domestic or financial details with anyone else except with my specific permission.
- 17.** I will do all that I can to provide you with a **healthy and safe** workplace. You are expected to work safely at all times and not endanger the health and safety of yourself, myself or anyone visiting my home.

Handout / Example Written statement of terms and conditions

- 18.** I will provide you with **supervision** and support on a regular basis. Opportunities will be provided for you to take advantage of appropriate **training** and learning.
- 19.** It is an essential part of your job description that you are able to **drive** my vehicle and that you hold a current full driving licence. If for any reason this is no longer possible you will automatically loose your job.
- 20.** I am a **non-smoker** and you are not allowed to smoke in my house or in my immediate presence.
- 21.** I will, within reason, provide you with **meals and refreshments** during the hours that you are working for me at no cost to you.
- You should not use my **telephone** on personal business without my specific permission. If you do need to use my phone you will re-imburse me for the cost of the call(s).
- 22.** If you have a **grievance** about your work you should raise this with me at the earliest available opportunity. If we cannot sort the problem out between us we will seek the help of a third party who is agreeable to both of us.
- 23.** I have attached a copy of the **disciplinary** procedure covering unsatisfactory work and gross misconduct to this statement.
- 24.** You have the right to join a **Trade Union** if you wish and I am prepared, if appropriate, to meet with your representative regarding your terms and conditions.

I have read the above statement of my employment particulars. I understand all the conditions and agree to abide by them.

Signature of employee Date

Signature of employer Date

- Trainers Question Sheet - Insurances

Can you think of any reasons
why you might need extra
insurance(s) because you are
using a personal assistant?

- Insuring yourself -

Home contents insurance

You will probably already have an insurance policy covering the contents of your home for theft and damage. Your policy will usually require you to notify your insurance company if someone, other than a member of your family, has regular access to your home, particularly if they have their own key.

Insurance companies will usually, but not always, make a note of what you tell them and continue to insure you at no extra charge.

If you have not told your insurance company that you have a personal assistant and you make a claim on your policy, you may find that they refuse to pay out.

Employer's liability insurance

You have a duty of care towards anyone who comes in to your home. If your p.a is killed or injured or contracts an illness or disease while working for you, and it can be proved that it is your fault, you could be sued and ordered to pay thousands of pounds of damages. Even if you won the case, you might have to pay the court costs.

- ⊗ you do not have a bath hoist and your p.a., following your instructions, injures their back lifting you in and out;
- ⊗ your p.a is electrocuted while cutting your grass because the cable to the mower has become frayed;
- ⊗ you drop a grape on the floor, your p.a. slips on it and breaks their leg.

If you have household contents insurance, it may already provide cover for your "domestic employees or servants". You should check what is covered by your policy and how much protection is provided - you should have at least £2 million pound of cover!

If you don't have the cover, or it doesn't seem adequate, you will need to arrange **Employer's Liability Insurance**. This will cover **you** against a claim from your **employee(s)**.

Any insurance company can arrange this for you. Most companies will combine it with Public Liability Insurance. The cost is small compared with the cost of meeting a claim without insurance.

Public liability insurance

If your p.a. injures somebody or damages their property while they are working for you, the 'third party' could make a claim against you for damages.

- ⊗ you or your p.a. scrape your chair along the side of your neighbour's car, causing £600 worth of damage;
- ⊗ your p.a. carelessly allows a shop door to smash into someone's face, knocking two of their teeth out.

Public liability insurance protects you by insuring your liability for death, injury, illness or disease of a 'third party' or damage to someone else's property, caused either by you or by your personal assistants.

Again you may already have adequate insurance cover under your Household Contents policy. If not, you should buy a separate public liability policy.

Car insurance

Using your car - if you are asking a paid personal assistant to drive your car or van, you must make sure that they are covered under your car insurance policy. You must be sure that :

- ⊞ your insurance company do not regard the employment of a p.a. as a business and expect a higher premium to cover business use. If they do, find an insurance company which will cover a p.a. driving your car as domestic use and change to them.
- ⊞ your p.a. has a valid licence before you let them drive your car.
- ⊞ your policy covers drivers of their age, if they under 26.
- ⊞ if necessary, they are named on your policy.

Using your p.a.'s car - if your p.a. uses their car when working for you, again you must make sure that they are covered under their car insurance policy. Most people are only covered to use their car for 'social, domestic and pleasure purposes'. It is best that **either** :

- ⊞ they extend their policy to include 'use on their employer's business'
- or
- ⊞ they get written authorisation that when they driving for you it is not counted as a business use.

Insurance companies

It is important that the insurance company understands the nature of the work and what is involved.

You want cover for **all** the people that assist you including directly employed personal assistants, voluntary workers, agency staff and members of your own family.

You want cover for **everything** that you and your p.a.'s do.

Some companies, such as Fish Insurance, can offer specially designed policies aimed at 'care users'. Other insurers will need guiding through the work involved and you might be advised to send them a copy of your p.a.'s job description.

At the very least, you must have a Household Contents policy, preferably one which specifically includes personal assistants or carers.

In addition, you should seriously consider having a specially designed Liability policy which will cover you against claims from both your personal assistant and from 'third parties'.

- Trainers Question Sheet -

Health and Safety

What do we mean when we
talk about Health and Safety?

What do we mean when we talk about hazards?

What hazards might there be
in your home or hostel?

- Health and Safety -

The Health and Safety at Work Act does not apply to people employed to provide personal assistance in your own home. However, in law, you owe a general duty of care to anyone coming in to your home and it is good practice to be aware of health and safety concerns.

- ✓ It is your responsibility to provide a healthy and safe work place for your personal assistant.
- ✗ It is your personal assistant's duty not to do anything which might endanger either your or their own safety at any time.

You will train your personal assistant to do what you want, in the way you want it done. Most of the time, they will be working directly to your instructions. Think about hazards in your home and how they can be avoided.

- ✗ use the proper moving techniques or handling aids. When you are moving from chair to bed or adjusting your body position, use mechanical or electrical aids whenever possible.
- ✗ you must ensure that p.a.'s follow the correct handling techniques at all times, and that they aren't wearing anything unsuitable such as high-heeled shoes for carrying out the manoeuvre. Think 'back'.
- ✗ check for obstacles and sharp surfaces.
- ✗ make sure nothing is left on the floor that could be tripped over.
- ✗ be aware of caustic substances in your home - bleach, wheelchair battery acid - and provide appropriate clothing for your p.a. to wear.
- ✗ make sure that electric and mechanical equipment is checked and maintained.
- ✗ look out for loose carpeting or rugs.
- ✗ ensure proper hygiene practices are carried out; disinfecting, washing hands and equipment after use, disposal of waste and so on.
- ✗ take extra care over the preparation and cooking of food - wash hands before and after, clean utensils and cutting tools thoroughly.

Much of it is common sense. However, keep on top of it!

Handout / Health and Safety

GPAP has some basic advice on health and safety issues.

You can get (or arrange) further advice from :

- ① a district nurse, contact them through your local GP practice.
- ① your social worker.
- ① an occupational therapist at Social Services.
- ① the Health and Consumer Services Department at the civic centre on 477 1011. They advise on food hygiene and general safety issues.
- ① The Health and Safety Executive - they can provide general advice on health and safety matters and have a range of leaflets. Their telephone number is 202 6200.

- Activity Sheet 7 -

Write a ' person specification' including all the skills and qualities you would want from your personal assistant.

Have a look at the Handout from Session 6 for some ideas to get you started.

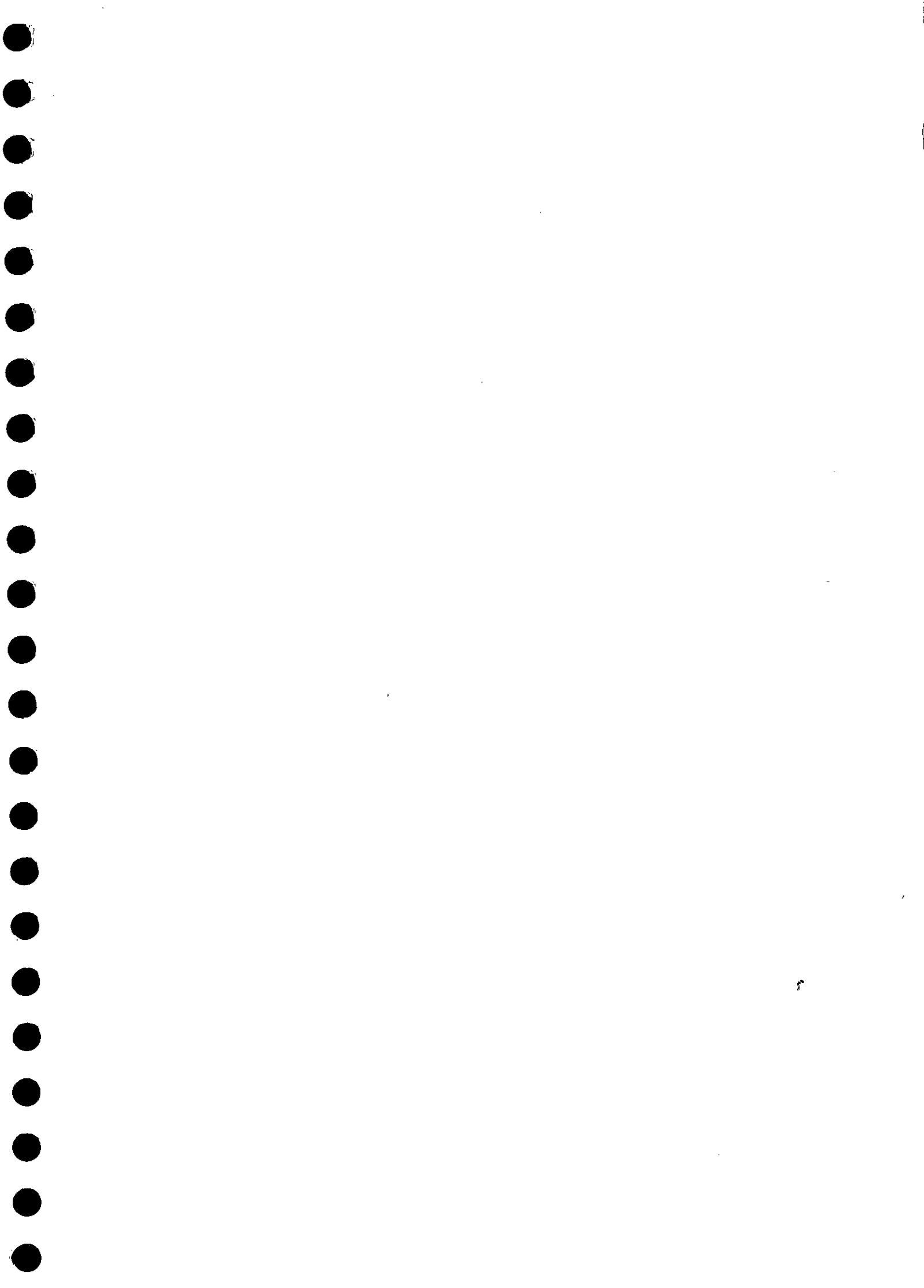
- What we have done today -

- ✓ developed and presented our job adverts
- ✓ developed a technique for shortlisting
- ✓ identified how to prepare for interview
- ✓ designed a list of interview questions
- ✓ discussed interview techniques
- ✓ identified the stages in making a decision
- ✓ drawn up a request for references form
- ✓ designed a written statement
- ✓ identified what you need to do to cover yourself - insurances, health and safety
- ✓ discussed this week's Activity Sheet - writing a person specification

- Next week -

Managing your personal assistant

- Any Questions or Problems? -



<u>Time</u>	<u>Content</u>	<u>Activity</u>	<u>Resource</u>
12 noon	Outline of today's session	Talk through	OHP
12.10	Feedback from Person Spec activity	Feedback/discuss	Flipchart
12.30	Induction - training your p.a.	Brainstorm/Discuss	Flipchart/Handout
1.15	Lunch	Eating	Food and drink
1.45	Giving instructions	Exercise	Matches/handout
2.00	Time Management	Talk/Discussion	Flipchart/Handout
2.20	Avoiding staff problems	Talk/Discussion	Flipchart/handout
2.40	Appraisal - how good is your p.a.	Talk/Discussion	Flipchart/handout
3.00	Tea / coffee / orange / water etc	Drink	Refreshments
3.10	Disciplinary procedures	Buzz groups	Pen and paper
3.20	Feedback from buzz groups	Feedback	Flipchart/handout
3.30	Back-up - what if	Talk/Discussion	Flipchart/handout
3.50	Activity sheets	Talking	Handout
3.55	Summing up the day and next week	Talking	OHP/handout

- Outline of the day -

- ◆ feedback from the person specification activity sheet
- ◆ induction - getting what you want from your p.a. the way you want it done
- ◆ lunch
- ◆ effective instruction giving
- ◆ managing your p.a.'s time
- ◆ avoiding staff problems
- ◆ appraisal - is everything going OK?
- ◆ how to discipline and , if necessary, sack a p.a.
- ◆ what if - safety nets and back-up systems
- ◆ Activity sheet 8
- ◆ summing up

- Activity Feedback -

**We asked you to write a
person specification
for your personal assistant.**

What did you come up with?

- Trainers Question Sheet -
- Inducting a personal assistant -

If you were starting a new personal assistant, what would you tell them about:

- their job ?
- the tasks they have to do ?
- what they should not do ?

Has anyone come across the term 'Induction'?

What about the term appraisal?

How often do you think you would need to appraise your p.a.

- Effective Induction -

A Disabled person's relationship with their personal assistant can be a close and complex one, but at the same time tremendously liberating. It is important that the relationship is as smooth and effective as possible, and that misunderstandings and disputes are avoided.

This can only be achieved if a personal assistant knows what their job involves, how they should do their work tasks, when they should do them and what they should not do.

Personal assistants are not mind readers. It is up to you to tell them what they need to know. If you do not manage or plan how you will do this, a personal assistant can end up confused and your relationship with them will get off to a bad start.

Induction is a way to start to build an effective working relationship with a p.a., and makes it clear that you are the one they should go to for advice and information.

Induction should never be delegated to family or friends, although you may want them to be with you. If you do, be sure to warn your p.a. before.

How you organise each induction will be influenced by the experience and needs of your p.a.. Also, you might find it necessary to explain to a p.a. the kind of lifestyle you have and what attitudes and approach you expect them to adopt when working for you.

As well as following the ten point plan below, you might also consider giving your p.a. experience in social situations with your friends and family around to see how your p.a. adapts.

A ten point plan for effective induction

- ❶ **Arrange a meeting** - you need to talk to your new p.a. about their job, its terms and conditions and your 'house rules' before they start working for you.
- ❷ **Make a checklist** - write down a list of everything you need to tell your new p.a.
- ❸ **Put aside time** - make sure you will not be interrupted when you meet your p.a. If you have an answerphone, leave it on.
- ❹ **Job description** - go through this so that your p.a. clearly understands what they are paid to do.

Ask them if there are any particular tasks they might find unpleasant for personal reasons or if they have any concerns or worries about the tasks they will be asked to do. Doing this at this stage ensures there is no confusion about what is expected by both parties.

However, don't forget that you and the p.a need to be flexible as your needs and wishes may change over time. A good employer will regularly review their employee's job description.

- ❺ **Terms and conditions** - go through your personal assistant's hourly pay, when and how their wages are paid, arrangements for holiday and sick pay, when and where they will work, parking facilities, who pays for breakages, whether you pay for a p.a.'s refreshments and meals, etc.

Although this will have been done during the recruitment process, it should be done again verbally and backed up with a written statement of their terms and conditions of employment. If your p.a. feels they aren't clear about these things, it will add to the anxiety and stress they may feel.

- ❻ **'House rules'** - prepare a list of issues that are important to you and that you want your p.a. to respect.

For example, you might not want them to smoke whilst at work or use your radio or TV without your permission. You might have certain standards of tidiness and you might want books and CDs put back in an exact spot.

You might be happy for your p.a. to bring a book to read when you do not have any tasks for them to do but they need to know that.

- ⑦ **Training, coaching & delegation** - a good personal assistant will want to know how you want them to do particular tasks and also whether they should do some tasks without having to wait for your instruction.

A p.a. might need **training** to be able to do certain tasks safely, for example, how to use a hoist or push a wheelchair. It is important to identify those areas where they need training and agree how you will respond to this. It will take time to train your p.a., particularly if they have to attend a professional training course on moving and handling, first aid or food and hygiene.

Coaching your p.a. to do certain tasks will be important if you choose to delegate tasks without the need for you to give your p.a. instructions. This should be done by:

- ✓ demonstrating the skill or task your p.a. needs to learn
- ✓ observing your p.a. trying the skill or task
- ✓ commenting on how your p.a. has done

Don't expect to be able to coach your p.a. in every task during your personal assistant's first shift. Begin with the most important tasks first. It might help if an experienced p.a. is there to assist with the coaching.

Finally, identify those tasks that you want to **delegate**. For example, feeding a pet, dusting, Hoovering, wiping surfaces or washing your kitchen floor.

Trust your p.a. to get on with these tasks, but monitor how they get on. They may form part of a general list of tasks that need to be done daily or weekly and that the p.a. should fit around other tasks.

- ⑧ **Discipline and Grievance** - the procedures that you have adopted for dealing with disputes and poor behaviour should be explained clearly and included in your p.a.'s written statement of their terms and conditions of employment.

Your p.a. should know from the start that you will use these procedures if it is necessary, but also that they have a right to raise grievances with you.

It is good practice to encourage your p.a. to join a trade union and allow a union representative to attend a meeting with your p.a. if disciplinary or grievance procedures are ever used.

Handout / Effective induction

- ⑨ **Risk assessment** - for health and safety reasons, you should organise a time to assess what risks there might be to your p.a. where they work and identify how to reduce these. For example, a pile of papers on the floor that someone might slip on should be removed or they might need training to be able to use a hoist safely.
- ⑩ **Appraisal** - after a month or two, you should review the performance of your personal assistant. This also gives your p.a. the opportunity to raise issues of concern to them.

Appraisal is important and you should prepare thoroughly for this meeting by making a checklist of what you want to say. If your p.a. is working a probation period or trial period, you may want to use this appraisal meeting to confirm their employment or say that you are ending their employment or extending their probation period.

Don't avoid appraisal. It is an opportunity to raise problems and deal with them in a constructive way rather than let frustrations fester.

- Giving Instructions -

Tell Allie, by giving her precise instructions, how to light a match.

Don't forget to tell her what to do with it!

- Giving Instructions -

Say:

- ✓ what you want done
- ✓ when you want it done
- ✓ how you want it done

You should:

- ✓ be clear
- ✓ be precise
- ✓ be positive
- ✓ give one instruction at a time
- ✓ if necessary, make a list
- ✓ prioritise
- ✓ stick to your decisions

Don't:

- X feel you have to say please
and thank you every time
- X apologise for making a demand

- Trainers Question Sheet -

- Time Management -

Who is responsible for managing a personal assistant's time?

How would you ensure your personal assistant uses their time well ?

- Time Management -

Using your personal assistant's time well is important, particularly if the number of hours of support you have is limited or they have a lot of tasks to complete.

- ✓ Plan how you will use you personal assistant's time.
- ✓ Make a task list or talk through with your p.a. necessary tasks at the beginning of each shift.
- ✓ Prioritise tasks - identify those that must be done first.
- ✓ Give clear precise instructions so there is no confusion
- ✓ Delegate tasks.
- ✓ Be realistic about how long a task will take.
- ✓ Make sure your p.a. knows how you like particular tasks to be done.
- ✓ Give your p.a. breaks during their shift when they can have time to themselves.
- ✓ Allow enough time for a p.a. to clean up after themselves before their shift finishes - a p.a. leaving dirty cups or a mess may wind up the next one.
- ✓ If your p.a. does not finish their shift on time, be prepared to pay overtime.
- ✓ There may be times when your p.a. doesn't have something to do. Accept this and don't put yourself under stress by always trying to keep them occupied.
- ✓ Expect the unexpected.

- Avoiding staff problems -

Conflict is a daily occurrence in our lives. We might disagree with a friend about what video we should watch or want to drink in different pubs and so on. When conflict occurs, it is usually resolved simply by talking and a bit of give and take. But sometimes conflict can be very serious where you and the other person cannot agree.

If you employ a p.a., there will be times when you will both disagree with one another, but at the end of the day your p.a. is there to meet your needs. However this does not mean they are a slave to be treated as you want. Avoiding and resolving staff problems and conflicts is dependent on good communication and effective action when problems arise.

➡ **Be assertive when communicating with your p.a:**

✓ **Clearly state your needs or what you want.**

"Will you wash my hair now."

"I would like you to work late on Friday night."

"If you find you are going to be more than ten minutes late for a shift, I would like you to phone me."

"I do not like hand marks on my paint, therefore I want you to be careful and avoid putting your hands on my walls, especially after reading a magazine or newspaper."

✓ **Own your needs or opinions**

"When we are in town, I do not want you to respond to someone who talks over my head."

"Although you have been trained differently, I choose to transfer to my wheelchair this way."

✓ **Respect the rights of others**

"I want you to work late tomorrow night. But will your baby sitter be able to work an extra hour?"

"I am sorry that your dad has died and of course I will be able to find another assistant for the morning."

➡ Effects of passive or non-assertive behaviour :

- ✖ You might end up agreeing to weak compromises or impractical solutions which you both feel unhappy with.
- ✖ Although you might have avoided a difficult situation or upsetting your p.a., frustration or resentment will continue.
- ✖ Persistent passive behaviour will cause you to lose self-esteem and confidence in your ability to deal with problems - sometimes this can cause internal tension and stress.
- ✖ Your p.a. might lose respect for you and find your lack of assertion irritating.

Dave's p.a. Jan has been half an hour late for several weeks when she is working an early morning shift. Dave agrees that Jan should try a bit harder, but says he understands that Jan might have difficulty getting up in the morning because this is something that he would find difficult if it was him. Jan's lateness, although not as bad, continues and Dave feels frustrated. He becomes irritated when Jan arrives late and does not talk to her much. Jan notices Dave's changed attitude and becomes stressed when she starts work for him. Dave wants to raise Jan's lateness again, but keeps putting it off. Jan begins to hate working for Dave and finds it difficult to sleep before a shift with Dave. This affects her health.

➡ Effects of aggressive behaviour :

- ✖ Although you and your p.a. might 'agree' to a solution, it may not be satisfactory since your p.a. may feel compelled to accept what you have told them. This will cause resentment and may mean the solution is not put into practice.
- ✖ You might feel a release of tension that has been building up and proud that you have got your own way, but this may reinforce your belief that this behaviour is effective.
- ✖ After you have thought about what you have done, you may feel guilty that you have not been fair causing you to be apologetic when making demands on your p.a..

Handout / Avoiding staff problems

- ✖ Alternatively, you may blame your p.a. for the difficult time you are having and feel any issue they raise is an attack on you.
- ✖ Your p.a. may feel they cannot talk to you.

Lucy's p.a., Sue, has shrunk an expensive item of clothing after putting it in the tumble dryer. Lucy tells Sue: "I am really pissed off that you have done this. If it ever happens again, I will take the cost of replacing the clothes out of your wages." Sue says: "Ok."

Lucy has had problems being assertive in the past and feels proud that she has dealt with the situation so effectively. Sue is clearly upset during the rest of her shift and does not engage in conversation with Lucy. After Sue has left, Lucy feels bad that Sue was upset but starts to get annoyed after thinking she has done nothing wrong. Two weeks later, Sue accidentally misreads a label and shrinks some of Lucy's favourite socks. Sue puts them at the bottom of Lucy's sock drawer.

➡ Giving criticism

- ✓ Be clear what you want to achieve by making the criticism.
- ✓ Think about how you will phrase your criticism.
- ✓ Identify your p.a.'s good points as well as the bad.
- ✓ Make your criticism clearly.
- ✓ Don't take longer than necessary.
- ✓ Ask them for their views of your criticism.
- ✓ Ask them if they can think of possible solutions.
- ✓ Give criticism in private and not in front of your friends, family or another p.a..

Handout / Avoiding staff problems

- ✓ Keep criticism balanced and acknowledge your p.a.'s good points.
- ✓ Avoid personal attacks.
- ✓ Do not exaggerate.

➡ Taking criticism

- ✓ Accept that your p.a. can be critical of you.
- ✓ Don't see criticism as a personal attack or challenge to your independence.
- ✓ Arrange a time for your p.a. to make their criticism.
- ✓ Listen to valid criticism.
- ✓ If criticism becomes personal, ask your p.a. to stick to the facts.
- ✓ Avoid criticism if either you or your p.a. are angry.
- ✓ If criticism is unclear, ask for examples.
- ✓ If you disagree with the criticism, say so assertively using clear "I" statements.
- ✓ If you accept your p.a.'s criticism, agree changes that need to be made and the best way of making them.

- Trainers Question Sheet -
- What makes a bad p.a.? -

When you are employing your own personal assistant, what kind of behaviour would worry you?

Think about things they might do, they might not do or they might say.

- A bad personal assistant ?-

A few warning signals to look out for:

- ✗ your p.a. ignores how you want tasks to be done.
- ✗ your p.a. does not respect your dignity or privacy.
- ✗ your p.a. talks about other people they work for.
- ✗ your p.a. makes decisions for you, e.g. deciding what you will eat or wear.
- ✗ you feel that you are not really in control of your own life.
- ✗ in social situations, your p.a. speaks for you.
- ✗ people generally address questions to your p.a. rather than you.
- ✗ if you speak, you find that your p.a. contradicts what you say.
- ✗ your p.a. actively refuses to do things for you, for example suggesting you wait till you get home before you go to the toilet.

If you recognise any of these warning signals, then maybe it's time to clear the air and/or look for another personal assistant.

- Trainers Question Sheet -
- Appraisal and Support -

You are going to meet with your
personal assistant, to discuss
how the work is going.

What issues might you discuss
with them?

- Appraisal & Support -

Regular appraisal by you of your p.a.'s is important. It should never be done by a relative or friend, although you might want someone there to help support you.

Appraisal should be seen as a positive exercise, not something you only do when a problem arises. It can be used to motivate and support your p.a., and create a happy working environment which will help to retain them (if that is what you want).

Also, it establishes the importance of good communication, a factor which experienced Personal Assistance users always identify as a key element in a good relationship with their p.a..

During appraisal you will need to raise issues that are of concern to you. Of equal importance is the ability to listen to what your p.a. has to say.

By asking your p.a. questions rather than just conveying your thoughts and instructions in a one-sided approach, you will give them confidence and self-esteem. This will help to develop mutual trust and respect. It will show them you are a source of help rather than a dictator.

Preparation is essential, therefore do a checklist. It is also important to identify a time when you will hold the appraisal and make sure you will not be disturbed.

Don't leave anything out of your checklist because you think it is too difficult to raise. Allowing problems to continue and fester will cause you frustration and create a bad feeling between you and your p.a..

If you think a p.a. lacks motivation, it may not be because they are lazy or unmotivated. They may simply be confused about what you expect of them.

If your p.a.'s leave their job after only a short time because they are unhappy, you will find that you have to recruit on a regular basis. This will affect your ability to get on with your life.

➡ Prepare by identifying what you want to raise with your p.a.:

- ? are there tasks which you think they are not doing well
- ? is there anything about their behaviour which you do not like
- ? are you happy about their approach to work
- ? are you happy with their time-keeping
- ? does your p.a. need trained to use equipment
- ? does your p.a. need coached in any task
- ? does their job description need to be updated
- ? have your needs changed
- ? and.....

➡ During the appraisal, make sure you ask your p.a.:

- ? do they think their original job description is still valid
- ? what problems are arising with their work tasks
- ? do they have any idea how these problems can be resolved
- ? is there any help you can give such as clearer instructions, more time to do tasks or training and more coaching
- ? is there any employment issues they wish to raise (such as last month's wages not being paid on time)

➡ If a difficult issue or grievance is raised by your p.a. during an appraisal:

- ✓ acknowledge what your p.a. has said
- ✓ say you will consider what they have raised
- ✓ seek advice
- ✓ decide what you will do
- ✓ if necessary, organise another meeting to give your thoughts or decision
- ✓ if your p.a. does not agree with you, agree how their grievance will be dealt with further

- ➡ If you have recently employed a new p.a., appraisal can be used to:
 - ✓ confirm they have passed their probation or trial period
 - ✓ tell them you are extending their trial period and why
 - ✗ explain you have decided to end their contract
- ➡ If your p.a. simply cannot do their job, appraisal will not sort that out.

If you answer YES to all the questions below and difficulties with your p.a. persist, you know you have a serious problem that you must deal with quickly.

- ? have I clearly explained to my p.a. their responsibilities at work, and have they acknowledged they understand these
- ? have I provided sufficient training so that my p.a. knows how to safely use equipment
- ? have I clearly coached my p.a. so that they understand how to do those tasks I delegate to them
- ? have I organised regular appraisal for my p.a.
- ? have I made them aware they are not doing their job properly
- ? have I provided them with an opportunity at appraisal to raise issues of concern to them
- ? have I done everything reasonable to ensure they succeed as my p.a.
- ? has my behaviour towards them been appropriate

Deciding that you must end your p.a.'s employment is not an easy task. Always follow the disciplinary procedure laid down in their written statement - never ignore this. Seek advice and once you have decided to act, do so.

A p.a. might be the nicest person in the world, but if they can't do their job they may endanger you, themselves and those around you. Personal Assistance is meant to be liberating, not a millstone around your neck.

- Trainers Question Sheet -
- Disciplinary procedures -

What do you think would be
unreasonable behaviour or practice
from your personal assistant?

Is there any behaviour so bad
that you would sack
your personal assistant immediately?

- Disciplinary Procedure -

Unless you employ over 20 people, you are not legally obliged to have a written disciplinary procedure for your staff. However, if you sack someone because you are dissatisfied with their work and they complain about you to an Industrial Tribunal you will have to show that you acted reasonably towards them.

It will be a great help to you at a Tribunal, and generally, if you have a written procedure to give to your personal assistants which shows that you will deal with work problems in an organised and fair way. Of course, it will only be of help if you actually follow what you have written down in your procedure.

It is your choice whether to have a written procedure. Either way, you must make clear decisions. And it will help if you can keep good records of everything that went on - what the employee did, what action you took, the dates you issued warnings and so on.

Most employers follow the same general procedure which is recommended by ACAS, the organisation which advises on employment disputes. It has four stages :

- **Stage 1** - Oral Warning (stays valid for 6 months)
- **Stage 2** - Written Warning (stays valid for 6 months)
- **Stage 3** - Final written warning (stays valid for 12 months)
- **Stage 4** - Dismissal

For simple but none the less annoying things like persistently not following your instructions about cleaning up, you would issue an oral warning. This should let them know you are serious and, hopefully, you will not need to take any further action. However, you should keep a written date of when you issued the warning

If there is no improvement, they do something else wrong within 6 months or you think that a matter is more serious than can be dealt with by an oral warning, you would move to Stage 2, the written warning. At this stage, you would write down how you want things to improve and give a time limit by which things must have improved .

If things do not improve, you give a final warning, and finally, if the situation still remains unresolved, you would sack your worker. The important thing is always to deal with problems as they arise and don't wait until you are at the end of your tether - that will only lead to bad decision making!

Gross Misconduct

Very rarely, a personal assistant's behaviour is so extreme that you need to get rid of them straight away. This situation is called Gross Misconduct and we give an idea of the kind of things it covers in the 'Example Disciplinary Procedure' printed below.

If one of your staff does something that you would consider gross misconduct it is probably best to suspend them at first rather than directly sack them. This has a number of advantages :

- you can seek advice before you take the final step
- you can investigate further, particularly important if you suspect them of something like stealing
- if you are on your own in the house with someone, it is usually easier to tell someone they are suspended than they are sacked. You can then pick the place and method for telling them they are sacked.

Ending someone's employment for any reason will have a big personal effect on their lives and on yours, and it should never be done lightly. If the situation is complicated seek advice - either from GPAPP, the Law Centre, the CAB or a solicitor.

'Example Disciplinary Procedure'

Purpose and Scope

The aim of this procedure is to maintain a good standard of conduct at work and to encourage improvement where necessary. The procedure sets out the action which will be taken when disciplinary rules are breached, aiming to ensure fair treatment for you at all times.

Principles

The procedure is designed to establish the facts quickly and to deal consistently with disciplinary issues. No disciplinary action will be taken until the matter has been fully investigated (with the exception of suspected gross misconduct).

At every stage, you will have the opportunity to state your case and, if you wish, to be represented by a person of your choice who is also agreeable to me.

Handout / Disciplinary procedure

I will initially attempt to resolve problems relating to conduct or performance through informal discussion.

The formal procedures described below will only need to be used when such informal methods have proved ineffective or been ignored.

You will not be dismissed for your first breach of discipline unless the offence amounts to gross misconduct.

The Procedure

Stage 1 - Oral Warning

If your conduct or performance is unsatisfactory, you will be given a formal Oral Warning which will be recorded and remain valid for six months.

Stage 2 - Written Warning

If the offence is more serious, if there is no improvement in standards or if a further breach of rules or conduct occurs, a Written Warning will be given. This will include the reason for the warning, detail how you must improve and give a time-scale within which conduct should improve. It will remain valid for six months.

Stage 3 - Final Written Warning

If conduct or performance is still unsatisfactory, a Final Written Warning will be given making it clear that any recurrence of the offence or other serious misconduct will result in dismissal. The Final Written Warning will remain valid for twelve months.

Stage 4 - Dismissal

If there is no satisfactory improvement, or if further serious misconduct occurs, you will be dismissed.

I reserve the right to implement any stage of the above procedure where earlier stages are likely to be ineffective or inappropriate in dealing with the matter.

Gross Misconduct

If you are suspected of Gross Misconduct you will be suspended immediately pending investigation. If Gross Misconduct is confirmed, you will be dismissed without further notice.

Examples of Gross Misconduct include :

- Theft or fraud
- Deliberate damage to property
- Incapacity for work due to being under the influence of alcohol or illegal drugs
- Physical or sexual assault or harassment (either whilst at work or outside working hours)
- Verbal abuse (whether to me or any third party)
- Threatening behaviour (whether to me or any third party)
- Gross insubordination (which will include any conduct that tends to undermine my independence or self-determination)
- Breach of confidentiality
- Deliberately or knowingly endangering my or anyone else's safety
- Failure to disclose criminal charges or convictions in your application form
- Persistent unreasonable lateness

These are only examples. Gross Misconduct is not limited to the behaviour listed above.

I have read the above Disciplinary Procedure which forms a part of the statement of my employment particulars. I understand the procedures and agree to abide by them.

Signature of employee Date

Signature of employer Date

- Trainers Question Sheet -
- What if -

Your personal assistant does
not turn up for work

- who you gonna call?

- What If -

➡ You need a p.a. at short notice:

a p.a. is taken ill

a p.a.'s child, partner, friend or relative dies or is seriously injured

you require more Personal Assistance when you become ill

an electrical appliance such as a hoist breaks down and you need a second p.a.

a p.a.'s child care arrangements break down

a p.a. comes into work drunk and you have to send them home

✓ Make sure you have the means to contact someone

You could use a telephone, a pendant or wrist band which is part of a community care alarm service, a telephone/pager, a press-button or pull-cord alarm which alerts a warden or some sort of 'help' signal. It is important that you can do this from different parts of your home, especially your bed.

It is a good idea to have 2 methods you can use in case one fails. The extra expense of buying a cordless phone might be justifiable, but make sure its batteries will last for a long time before they need recharged.

✓ Identify people who you can contact

Prepare an emergency 'stand-by' list of people you can contact. This could include friends, family, neighbours, former personal assistants, people who work for you occasionally, social services contacts, a private care agency, etc.

You need to have a phone number for each person. You might need to memorise this if you cannot keep a list near you at all times. Your 'stand-by' list should **only** include people who have agreed that they can be contacted at short-notice.

The circumstances when they are contacted and the tasks they will be expected to do during an emergency should also be identified and agreed beforehand.

✓ **Be realistic with family or friends**

Those who are close to you will almost certainly help you out in an emergency, but they might have family and work commitments that will make this difficult. Whilst they might say they can help you out, do be sure that this is the case and that it will not cause them major problems if you turn to them in an emergency. They might respond, but if this is done reluctantly it could put your relationship with them under strain.

✓ **Update your 'stand-by' list**

Regularly check that the information on your list is accurate and that those named are still willing to be contacted.

✓ **Be clear how people will get into your house**

If you give a key for someone to keep in an emergency, make sure people can get access to this. You might want to ask social services or your landlord to install a door entry system. If you have double-glazing, be sure that people know how to smash this if they have to break a window to get in.

✓ **If you can't contact anyone on your stand-by list**

Depending on the situation, your last resort might be to call 999 and ask the police to respond. They may be willing to assist you out of bed into a chair or lift you up if you have fallen, but they would expect social services to take responsibility for any other immediate needs that were evident or have you admitted to hospital.

➡ **You have a fire:**

- ✓ You and your p.a. will need to act quickly.
- ✓ You need to agree with your p.a.s what would happen if this situation arises :
 - How would you alert the emergency services?
 - How would you get out?
 - What are your escape routes?

Handout / What if

- ✓ It is unacceptable for you to expect your p.a. to put their life in danger trying to save you.
- ✓ You should assess what risks there are of a fire starting in your home (such as cigarettes, clothes being too near an open fire, faulty electrical appliances, chip pans, etc) and do something to reduce these.
- ✓ You need a means of being alerted quickly. Installing smoke detectors in each room is commonsense, and connecting them to your electricity supply should be considered.
- ✓ Placing small fire extinguishers around your home as a precautionary measure should be considered, but be sure you and your p.a.'s know how to use them.

- Activity 8 -

You have a new worker starting tomorrow. Write a checklist which will tell them:

- what tasks they need to do;
- how you want them done;
- when you want them done;
- where equipment and household materials are.

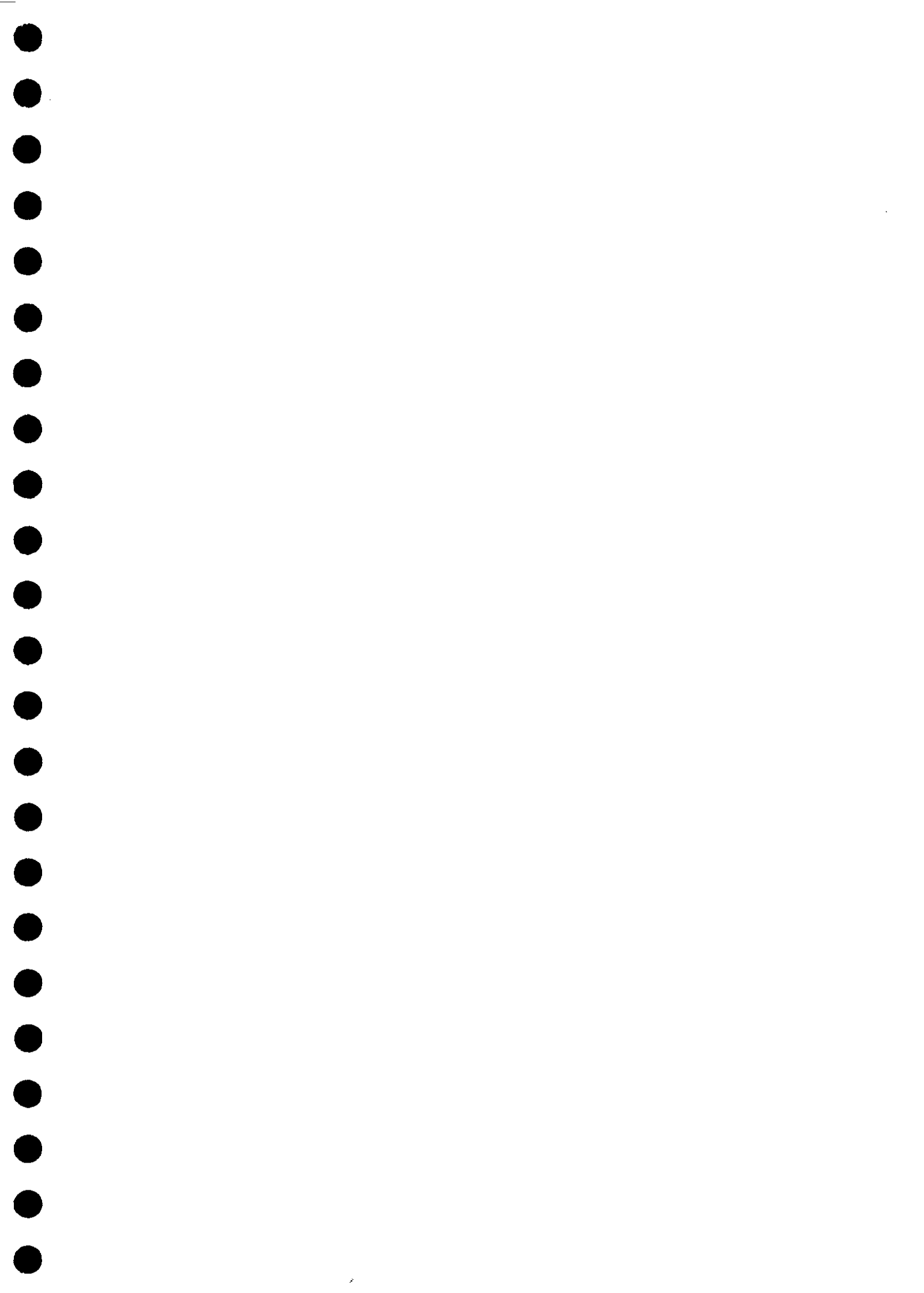
- What we have done today -

- ✓ designed a person specification
- ✓ developed techniques for inducting staff
- ✓ identified methods for giving instructions
- ✓ learned time management skills
- ✓ discussed techniques for avoiding staff problems
- ✓ understood appraisal techniques
- ✓ designed a disciplinary procedure
- ✓ identified back-up systems
- ✓ Discussed this week's Activity Sheet -
'produce an Induction Checklist for new staff'

- Next week -

Managing your finances

- Any Questions or Problems? -



<u>Time</u>	<u>Content</u>	<u>Activity</u>	<u>Resource</u>
12 noon	Outline of today's session	Talk through	OHP
12.10	Feedback from Induction activity	Feedback/talk through	Flipchart
12.20	Ways of paying for things	Brainstorm/Discussion	Flipchart/handout
12.25	Places to keep your money	Brainstorm/Discussion	Flipchart/handout
12.30	Budgeting	Brainstorm/Discussion	Flipchart/handout
1.00	Lunch	Eating	Food and drink
1.30	Employee? Paying Tax and NI?	Brainstorm/Discussion	Flipchart/handout
1.50	Paying wages	Brainstorm/Discussion	Flipchart/handout
2.40	Tea / coffee / orange / water etc	Drink	Refreshments
2.50	Statutory Sick Pay	Talk through	Flipchart/handout
3.00	When and how to pay someone	Talk/Discussion	Flipchart/handout
3.10	Wages slips	Talk through	Flipchart/handout
3.15	Keeping financial records	Talk/Discussion	Flipchart/handout
3.30	Sources of help	Brainstorm/Discuss	Flipchart/handout
3.50	Activity sheets	Talking	Handout
3.55	Summing up the day and next week	Talking	OHP/handout

- Outline of the day -

- ◆ feedback from the Induction Checklist activity sheet
- ◆ ways of paying for things
- ◆ places to keep your money
- ◆ keeping a record of your finances
- ◆ lunch
- ◆ effective budgeting
- ◆ the options for paying staff
- ◆ Pay Slips - what has to be included
- ◆ paying tax and national insurance
- ◆ sources of help
- ◆ Activity sheet 9
- ◆ summing up

- Induction feedback -

We asked you to produce an
Induction Checklist.

What issues would you
want to follow up
with your worker?

- Trainers Question Sheet -
- Paying for things -

How many different ways
can you think of
to pay for things?

- Ways of paying for things -

Cash

Cheque

Switch or Delta card

Credit card

High street voucher

Hire Purchase

I. O. U.

Monthly rental

- Trainers Question Sheet -
- Places to keep your money -

How many different places
do you know of
to keep your money?

- Places to keep your money -

Under the bed

Post Office

High Street Bank

Giro Bank

Building Society

Credit Union

- Trainers Question Sheet -
- Personal budgeting -

If you were working out
a weekly budget for how much you spend
and how much money you get in
what kind of things would
you include in :

- your income
- your expenditure

- Personal budgeting -

My weekly budget		
Money In	Description	Money Out
	⇐ Wages	
	⇐ Income Support	
	⇐ Incapacity benefit	
	⇐ Disability Living Allowance	
	⇐ Pension	
	⇐ Interest on savings	
	Rent / mortgage ⇒	
	Council tax ⇒	
	Gas ⇒	
	Electric ⇒	
	Service contract ⇒	
	Water ⇒	
	Telephone ⇒	
	Insurances ⇒	
	Home care ⇒	
	Alarm call ⇒	
	Food ⇒	
	Clothes ⇒	
	Taxis/transport ⇒	
	Car ⇒	
	TV Licence ⇒	
	Entertainment ⇒	
	Holidays ⇒	
	Repairs ⇒	
	HP/credit card ⇒	
	Saving up ⇒	
	Bank charges ⇒	
	Childcare ⇒	
	Totals	

- Trainers Question Sheet -
- Personal assistance budgeting -

If you were working out
a personal assistance budget
what kind of things would
you include in :

- your income
- your expenditure

- Personal assistance budgeting -

My Personal Assistance budget		
Money In	Money to pay for p.a.'s	
	⇐ Disability Living Allowance	
	⇐ Severe Disability Premium	
	⇐ Direct Payments	
	⇐ Independent Living Fund	
	⇐ Compensation	
	⇐ Disablement Pension	
	Costs of employing a p.a.	Money Out
	Hourly rate of pay ⇒	
	Employers N I ⇒	
	plus contingency fund for:	
	Holiday cover ⇒	
	Sickness cover ⇒	
	Emergency cover ⇒	
	Stand-by payment ⇒	
	Liability Insurances ⇒	
	Car insurances ⇒	
	Training charges ⇒	
	Redundancy fund ⇒	
	Staff recruitment ⇒	
	Stationery costs ⇒	
	Telephone calls ⇒	
	Banking charges ⇒	
	p.a.'s food & drink ⇒	
	Book keeping fees ⇒	
	Totals	

- How many hours ? -

First, work out the hourly cost to you of employing a personal assistant.
For example :

- | | |
|---|-------|
| ① Hourly rate of pay. This is paid to your p.a. | £5.00 |
| ② Employers National Insurance. This goes up in steps depending on how much you pay your p.a. in a week. Allow an average of 6%. | £0.30 |

You will / may also have to pay for a number of other items and you should save money on a weekly basis in a contingency fund to meet these costs.

- | | |
|---|-------|
| ③ Holiday cover. If you give 4 weeks holiday, allow 8% on top of your hourly rate to pay this. | £0.40 |
| ④ Sickness cover. Expect up to 2 weeks sickness in a year and allow 4% on top of your hourly rate to pay this. | £0.20 |
| ⑤ Emergency cover. Allow 4% to cover unexpected absences, extra hours, overtime and so on. | £0.20 |
| ⑥ Admin costs. Allow 8% to pay for insurances, recruitment, your admin and so on. | £0.40 |

Total hourly cost	<u>£6.50</u>
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You will actually pay out ① + ② = £5.30

You will bank ③ + ④ + ⑤ + ⑥ = £1.20

Decide how much a week you want / can afford to spend on Personal Assistance. For this exercise, let's assume you get the highest care component rate of Disability Living Allowance and decide to spend it all on p.a.'s.

Money to spend	£52.95
÷	
(divided by the) Hourly cost	£6.50
=	
Number of hours you can afford	<u>8 hours</u>

- Trainers Question Sheet -
- Employee or Self-employed -

Why does it matter?

So why isn't everyone self-employed?

What is the difference between
someone who is an employee and
someone who is self-employed?

What is 'casual labour'?

What happens if I pay a personal
assistant cash and the tax office
decides that they aren't really self-
employed?

- Employee or Self-employed -

You may have heard people say that their personal assistant is self-employed. They don't have to bother with all this tax nonsense and filling in forms - they just give their p.a. cash and let them sort it all out.

Unfortunately, it's not quite that simple.

Why does it matter?

If you employ someone, you have to keep proper records of all the money that you pay them. You have to collect tax and national insurance from them and send it to the tax collector. You, as the employer, also have to pay an extra amount of national insurance.

If someone is self-employed, they are responsible for paying their own tax and national insurance. They have to keep most of the records. You don't have to pay the employers share of the national insurance and so you could save some money.

However, you are still required to tell the tax office at the end of each tax year how much you have paid someone, whether they were employed by you or they were self-employed. As importantly, your p.a. must pay the tax and national insurance that they owe.

So why isn't everyone self-employed?

There are very strict rules about who can be classed as self-employed.

If you are self-employed you:

- ⊙ should be running a business and be at risk of making a loss as well as a profit
- ⊙ would normally be paid a fee, not an hourly rate
- ⊙ control your work, working to an agreed contract or instructions
- ⊙ get no holiday or sick pay
- ⊙ are available to work for more than one person
- ⊙ have a contract describing the work to be done

If you are an employee you:

- would have a contract of employment
- get paid a set rate for the hours worked
- would work for a specified number of hours
- work on your employer's premises
- use equipment supplied by your employer
- do work which is controlled by your employer

Unless your personal assistant has set themselves up as a business to supply you, and maybe other Disabled people, with Personal Assistance services they are almost certainly your employee, **even if they only work for you for a couple of hours a week.**

So what about casual labour?

People often think that because they just employ someone for the odd hour every week, they are classed as casual labour and don't need to pay tax and national insurance. This is not usually true.

A casual employee is someone :

- ⊙ who works for you for less than a week
- ⊙ is not regularly employed by you. Someone working the odd hour a week for you, every week, is classed as part-time, not casual
- ⊙ does not work for anyone else during the week they work for you.

If you pay them more than £64 in the week (April 1998 figures) you will still have to collect national insurance from them. If you pay them more than £100 in any one year, you will have to tell the tax office.

What happens if I pay cash and the tax people decide that they aren't really self-employed?

It's not up to you or your personal assistant to decide if they are self-employed. The decision is made for you by the tax people (the Inland Revenue).

If you have told the tax people that you have paid someone on a self-employed basis and they decide that you were really the employer, they will usually try and come to some agreement with you about how much money is owed and who should pay it. It will help if your p.a. has paid the tax that they owe.

If the tax people decide that the arrangement between you and your p.a. was solely designed to avoid paying tax and national insurance, you will have to pay back all the money you owe. You could be fined and would face possible imprisonment.

We would strongly recommend that, unless your p.a. can provide you with proof that they have registered with the tax office as self-employed, you always treat them as your employee and you collect any tax and national insurance that may be due.

If your p.a. is self-employed, they can always claim the money back later - you could end up in court owing an awful lot of money!

- Trainers Question Sheet -
- Tax and National Insurance -

What's the difference between tax and National Insurance?

Who pays tax?

Who pays National Insurance?

What is the tax year?

What is a tax code?

- Tax and National Insurance -

Usually, anyone who has a paid job has to pay tax and National Insurance (NI) to the government from their wages.

Tax is used to pay for most of the central and local government spending.

National Insurance goes towards funding some unemployment benefits, sickness and maternity pay and state pensions.

It is your job, as the employer, to **deduct** this tax and NI before you pay someone their wages and to send this money to the government every month.

◆ What is a tax year

The calendar year runs from 1st January to 31st December.

For historical reasons which are no longer relevant, the tax year runs from the 6th April in one year to the 5th April in the next year.

◆ Tax

Tax is paid on most types of income that a person gets. This would include:

- wages
- pension
- some welfare benefits
- interest on some investments in banks and building societies

Tax free income and tax codes

Everyone is entitled to a certain amount of tax free income every tax year. The basic entitlement is called the “**personal allowance**”. People can get extra tax relief because, for example, they are married, they have a dependent child, they are aged over 65 or they are blind.

The tax people work out the amount of tax free income that everyone is entitled to earn before they pay tax. They then send everyone who needs one a **Tax Code** which tells you how much tax free earnings you are entitled to.

Handout / Tax and National Insurance

The basic tax code for a single person is (at 6th April 99) 433L. This means that someone can earn just over £4,330 in the tax year before they have to pay tax. This tax free amount usually goes up every year in the budget.

How much tax do you pay?

Generally, someone would start paying tax once they earn £83 a week or £361 a month. If someone has more than one job, this figure is based on their total income from all their jobs.

The lowest rate of tax is 10% of their **taxable earnings** (what's left after you deduct their tax free allowance); they then move up to paying 23% (the **basic rate** of tax) of their taxable earnings and finally, once someone earn over about £28,000, they pay 40%.

If someone doesn't provide you with details of their tax code, for example because they have another job, you would deduct 23% of all their wages as tax.

► National Insurance (NI)

Both employers and employees pay National Insurance contributions.

The employee starts to pay National Insurance once they earn over £66 a week or £286 a month (at 6th April 1999) in their job with you. If they have more than job, they can earn up to £66 in each job before paying National Insurance.

Employees pay 10% of all of their earnings between £66 a week and £500 a week (£286 to £2,167 a month).

Employers pay 12.2% of their employees earnings above £83 a week. There is no upper limit for the employer and they pay National Insurance on everything their employee earns.

People who have reached the state retirement age (60 for women and 65 for men) do not have to pay National Insurance contributions if they choose to carry on working. However, they must apply for an exemption certificate and they may still have to pay tax. The employer has to pay the employer's National Insurance contribution even though the employee may be over the retirement age.

- Paying Tax and National Insurance -

When you employ someone, you must :

- ⊙ deduct the correct amount of tax from your p.a.'s pay
- ⊙ work out how much National Insurance (NI) you and your p.a. have to pay
- ⊙ keep a record of your p.a.'s pay and how much tax and NI they have paid
- ⊙ make monthly (or quarterly) payments of the tax and NI due to the tax and NI people

You do this for every tax year that you employ someone. The tax year runs from the 6th April in one year to the 5th April in the next year.

This handout is a quick guide to the basic things that you need you know and have to do in order to employ someone. It is not a complete guide and you should always seek further advice before you start. The figures used were right at 6th April 1999 but they usually change during the year

Different rules apply if, for example, you are employing a student during their official holidays or you pay someone less than £66 a week.

① Register with the local Tax office

If you employ someone (or are planning to employ someone) you must first register with the local Tax Office. The local Tax Office for Gateshead is now based in Sunderland. The address is:

Inland Revenue
Sunderland 1
Gilbridge House
High Street West
SR1 3HL

telephone : (0191) 510 6500 (voice)

They will register you as an employer and give you an **Employer's Unique Reference Number** which you must keep a record of. It will be used in all your future dealings with the tax and National Insurance people. The tax office will make sure that you get all the forms and information that you need sent direct to your home. If you want them to, they can also help you to fill in the forms and answer any questions that you may have.

② ask the tax office for all the relevant paperwork

The tax office should automatically send you all the forms and paperwork that you need in order to employ someone.

This will include:

- i an employer's quick guide to paying tax and National Insurance
- i tax tables, for working out how much tax your p.a. will have to pay
- i NI tables, for working out how National Insurance you and your p.a. will have to pay
- i deductions sheets, to help you work out all the deductions
- i monthly record sheets, to keep a record of the money you've paid someone and how much you've taken off in tax and NI

If your p.a. earns less than approximately £200 per week you could use the **Simplified Deduction Scheme**. This requires less paperwork, is easier to work out and you only need to send information to the tax people every 3 months. Ask the tax office if you can use this scheme and for them to send you a 'P4Q Starter Pack' which gives you all the relevant information.

③ ask your p.a for a P45

Anyone who has worked before will have been given a P45 by their last employer. It used to be known as 'your cards'.

Your p.a. should give you their P45 when they start work with you. It tells you:

- i your p.a.'s national insurance number
- i your p.a.'s tax code - you need this to work out how much tax they have to pay
- i how much tax your p.a. has already paid in this tax year
- i how much NI your p.a. has already paid in this tax year

④ what if my p.a. doesn't have a P45?

Is working for you their only job?

If **yes**, and they earn enough to pay tax and/or national insurance, ask the tax office to send you a P46. Fill it in and send it back and the tax people will send you a tax code for them.

If **no**, your p.a. probably works for someone else and they gave them the P45. You would normally have to pay them as Basic Rate taxpayers and they pay tax on **all** their earnings with you.

- ⑤ every time you pay someone, use the deductions sheet and the tables to work out the tax and NI owed

When you registered with the tax office, you will have been sent everything that you need to work out the tax and National Insurance that your p.a has to pay and the National Insurance that you have to pay.

If you have any problems at all using the forms and tables, **seek advice** straight away.

- ⑥ send off the tax, the employees NI and the employers NI every month (or quarter, if the tax office agrees)

You are required by law to send off every month the tax and National Insurance that you have collected from your p.a. (s) and from yourself during that month. If you send the money off late, you are automatically charged interest on the money owed until it arrives.

The tax office will provide you with pre-printed forms and envelopes for you to use when sending off the tax and NI contributions.

If you have arranged to use the Simplified Deduction Scheme, you may be able to send the money off once every three months. You must get the tax office's written agreement to do this, otherwise you will be charged interest.

- ⑦ at the end of the tax year, send off a record of all the tax and NI you have paid all of your p.a.'s during the year

Around February of each year, the tax office will send you all the forms you need to fill in your '**end of year returns**'. Basically, you are asked for details of:

- ⊙ everyone you have employed and paid more than £100 to during the year;
- ⊙ how much you paid them in total;
- ⊙ how much tax and National Insurance you deducted from their wages;
- ⊙ how much National Insurance you paid;

Handout / Paying Tax and National Insurance

- ⊙ any expenses or any other non-cash benefits you may have given your p.a.'s;
- ⊙ any statutory sick pay or maternity pay you may have paid.

The tax people will provide you with an envelope to send all the information back in.

You are also required by law to give each of your employees (even if they no longer work for you) details of the tax and National Insurance they paid whilst working for you. You will be given a form **P60** to fill in with this information.

8 What do you do if your p.a. doesn't earn enough to have to pay tax and NI?

If your p.a :

- ✓ only works for you and nobody else at all
- ✓ earns less than £66 a week
- ✓ does not have a pension or any other taxable income such as some welfare benefits

they will not have to pay tax or National Insurance. If they earn more than £66 but less than £83, they will pay NI but not tax.

You must still :

- ✓ keep a record of all the money you pay them during the year
- ✓ deduct NI if they earn between £66 and £83
- ✓ at the end of the tax year, use the form provided to send off details of all the wages which have been paid free of tax and National Insurance.

- Statutory Sick Pay -

Statutory sick pay is a minimum level of sick pay which must be paid to most employees who are off sick for 4 or more of their normal working days.

Who is paid SSP?

To be paid SSP your p.a. must :

- have been sick for 4 or more calendar days. However, they will only get SSP for the days that they normally work for you, known as qualifying days.
- have earned on average more than £66 a week during the previous eight weeks (as at 1st April 1999)
- be between 16 and 65 years old

How much?

Statutory Sick Pay (SSP) is approximately £60 per week and is paid for each qualifying day that someone is off sick. A qualifying day is a day that someone normally works for you.

Can I claim it back?

You may be able to claim some of it back, depending on how much tax and National Insurance you normally send off to the tax people.

Seek advice

Statutory Sick Pay is complicated to work out and administer. Most businesses don't now bother to try and claim the money back and run their own sickness schemes instead. They are allowed (and the government encourages them) to do this as long as their sickness scheme is at least as good as the governments.

You probably can't afford to not claim the money back. If your p.a. is off sick you need to make sure that claim back every penny you are entitled to.

- When and how to pay your p.a. -

When to pay your p.a.

Most people pay their p.a.'s wages either **weekly** or **monthly**.

Monthly is usually easier for you because you only have to do the paperwork once a month and there are less calculations to do. For this to work, you need to be able to keep good records of how many hours your p.a. has worked, and be able to find them when you need them at the end of the month.

You may find that your p.a. wants you to pay them weekly because they need the money as soon as they have earned it. You should agree the best system for both of you with your p.a.

Some people, particularly if their p.a. works set hours every week, pay their p.a. once every four weeks. The problem with this is that all the tax tables are based on a weekly or monthly payment system. If you pay every four weeks, you still have to work out every week separately and you don't cut out any of the calculations.

You will also have to decide on which day your week starts and finishes and on which day of the week or month you will pay your p.a. It is up to you to choose.

How are you going to pay your p.a.

Cash - easy to arrange and use, but no automatic record of the payment and not very secure;

Cheque - straightforward, fairly secure and gives you a record of payment, but your p.a. needs to have a way of cashing it;

Postal Order - fairly easy to arrange, but there is a charge and, if lost or stolen, they can be cashed by someone else;

Bank transfer - safe, but involves you in more work than a cheque and your p.a. must have a bank account;

Standing order - only works if you always pay the same amount or are prepared to keep telling the bank or building society to change it.

- Wages slips -

You must give all your employees a wages slip every time you pay them their wages. The wages slip should tell them :

- i the date that they are being paid
- i the tax month (or week) the pay slip covers. Don't forget that the Tax Year runs from 6th April in one year to 5th April in the next. That means that April is Month 1, August is Month 5 and February is Month 11
- i their total gross pay for the month. This is their pay before any money, such as tax and National Insurance, is taken off
- i the tax you have deducted from their pay
- i the tax code you have used to work out their tax free pay
- i the National Insurance you have deducted from their pay
- i their actual or net pay for the month
- i how much in total you have paid them (before deductions) this tax year
- i how much tax you have deducted from them this tax year






You can buy books of blank wages slips from stationery shops like WHSmiths or you can design your own.

Name:		Tax Code:	
Date:		Tax Month:	




	£	p	
Gross Pay			Gross Wages paid to date <div style="display: flex; justify-content: space-around; margin-top: 5px;"> £ p </div>
less			
Income Tax			Tax deducted to date <div style="display: flex; justify-content: space-around; margin-top: 5px;"> £ p </div>
National Insurance			
Other deductions			
= Net pay for month			

- Keeping records -

Why do you need to keep records









-  it will help you to keep on top of everything;
-  you may need to know, for example, how much holiday someone has taken to date and how many days they have left;
-  you might need to contact a p.a. and need a phone number in a hurry;
-  it's important to know how much of your Personal Assistance money you've spent and how much you've got left;
-  other people may want information from you:
 - i** if you employ someone, the inland revenue and contributions agencies will want information about the tax and National Insurance you have collected. You have to keep tax and NI information for 7 years;
 - i** if you get money from the council through the Direct Payments scheme, they will want information and proof about what you have spent it on;
 - i** if you get money from the Independent Living Fund, they will also want information about what you have spent the money on.

General principles









-  always get and keep a receipt for any money that you spend;
-  make sure that your p.a. signs a receipt for any money that you give them;
-  keep your receipts, payments and so on in date order. Number them as they come in. It makes it easier when you come to work things out later.

What records do you need to keep









► for your Personal Assistance finances

-  receipts for all the money that you spend
-  credit card slips
-  copies of bills and invoices
-  cheque book stubs, completed whenever you fill in a cheque
-  correspondence to do with the money that you receive, particularly from the Council and/or the Independent Living Fund
-  paying in book slips, stamped every time you pay money into the bank
-  bank statements, showing money paid in and out
-  your own bank records, showing money paid in and out. These will give you a running total of how much money you have, allow you to check for any mistakes and identify any income and payments which haven't been cleared by the bank.





► for paying wages

-  time sheets
-  Copy of P45 or P46
-  National Insurance number and Tax code
-  Tax and National Insurance tables and deduction sheets
-  monthly or quarterly tax and NI payment slips
-  sickness records
-  wages slips
-  End of year returns (sent to you automatically)

► information about your p.a.

-  job application form
-  references
-  proof of immigration status
-  personal details, address, phone number and so on
-  Holiday record
-  disciplinary record
-  copy of their driving licence
-  any other correspondence about your p.a.

► insurance policies

-  Employer's liability insurance
-  Public liability insurance
-  Home contents insurance - particularly any correspondence regarding cover for non-family members with access to the house
-  Car insurance - particularly any correspondence regarding cover for either your p.a. to drive your car or you being a passenger in your p.a.'s car.

- Staff records -

p.a.'s name

address

.....

.....

phone no

Date started

Date left

National Insurance number

Proof of Immigration status

Person p.a. wants contacted in event of emergency

name

phone no

Dates of supervision sessions

.....

Driving Licence

Insurance policy

Date completed:

- Weekly rota -

Employees name :

Week beginning Sunday :

Day	Start Time	Finish Time	Hours worked	Overnight shift
Sunday				
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				
Totals				

Total Hours x hourly pay rate = £

Total overnights x pay rate = £

Gross Pay = £

- Holiday Form -

p.a.'s name

holiday year from to

annual holiday entitlement (days)
(based on p.a.'s average working day)

any holidays owing from last year

holiday entitlement this year

Date started holiday	Date returned to work	Days of Holiday taken	Holidays left

- Banking record -

Ross' p.a. bank account					Sheet no:	
Date	Cheque number	Paid to / money from	✓	Money out -	Money in +	Balance
-	-	-	-	-	b/forward	
				carry forward		

- Don't Panic -

Employing and paying staff can seem confusing and an awful lot to take on, especially if you've never done it before.

There are people who can help you if you get any problems and there are alternatives if you don't want to do all the paperwork.

The Tax Office

The local Tax Office for Gateshead is now based in Sunderland. They will register you as an employer and give you an 'Employer's Unique Reference Number'. They can also answer any questions you may have about paying wages and will come out to visit you in your home if requested.

The address is: Inland Revenue
Sunderland 1
Gilbridge House
High Street West
SR1 3HL
telephone : (0191) 510 6500 (voice)

Employer's helpline

The government provides a telephone helpline for employers and small businesses. For the cost of a local call you can get the answers to any questions you may have about tax, National Insurance and VAT.

telephone : for existing employers - 0845 7 143 143 (voice)
for new employers - 0845 6 070 143 (voice)

National Insurance Numbers

It is essential to have a National Insurance for anyone that you employ. Without it, your p.a. cannot be credited for their tax and NI payments.

If someone can't remember or has lost their National Insurance number you can get it for them. Ask the Tax Office for a form **CA6856**. Fill it in and send it off to : the Contributions Agency, P46 Section, Room A1401, DSS, Longbenton, Newcastle NE98 1AX.

If your p.a. has never had a National Insurance number, they must go personally to their local Social Security office and ask for one.

Computer software

There are computer software packages which are designed to work out wages. You enter the gross pay, the p.a.'s tax code and date of birth. The software tells you how much tax and National Insurance to deduct and gives you their net pay. It will even print out a wages slip for you.

The software can be expensive, especially if you are only employing one person, and it does need to be updated at least once year when there are changes to tax codes and, sometimes, tax rates.

Accountants

Some Disabled people pay an accountant or book-keeper to take care of the wages for them. This can be a fairly straightforward way of dealing with all the paperwork - you tell them the hours worked and the rate(s) of pay and they do the rest. However, it will cost you and this will eat into the number of hours of Personal Assistance you can afford.

GVOC Community Accountancy Project

The Gateshead Voluntary Organisations Council (GVOC) runs a community accountancy project which offers book-keeping and financial services. In the past it has been mainly aimed at voluntary organisations but they are now looking at offering a wages service for individuals for an all in monthly charge. Contact GPAPP if you would like more information on this.

Agency Staff

It is possible to come to an agreement with a home-care agency such as the British Nursing Agency (BNA) or Leonard Cheshire whereby they will employ staff on your behalf. You choose and manage the staff you want - they deal with all of the employment side, paying wages, etc.

This can make it easier, if you wish, to employ a number of different workers for short periods of time. It also means that you have an established relationship with an agency if you need a p.a. in an emergency. However, there is a cost. The BNA charge 35% - over a third - on top of the hourly rate for employing someone. That could mean you get a third less hours of Personal Assistance for your money.

GPAP

We can provide advice and support, whether you want to directly employ someone or use another organisation. Get in touch!

Work out a weekly budget for yourself, showing all your income and expenditure.

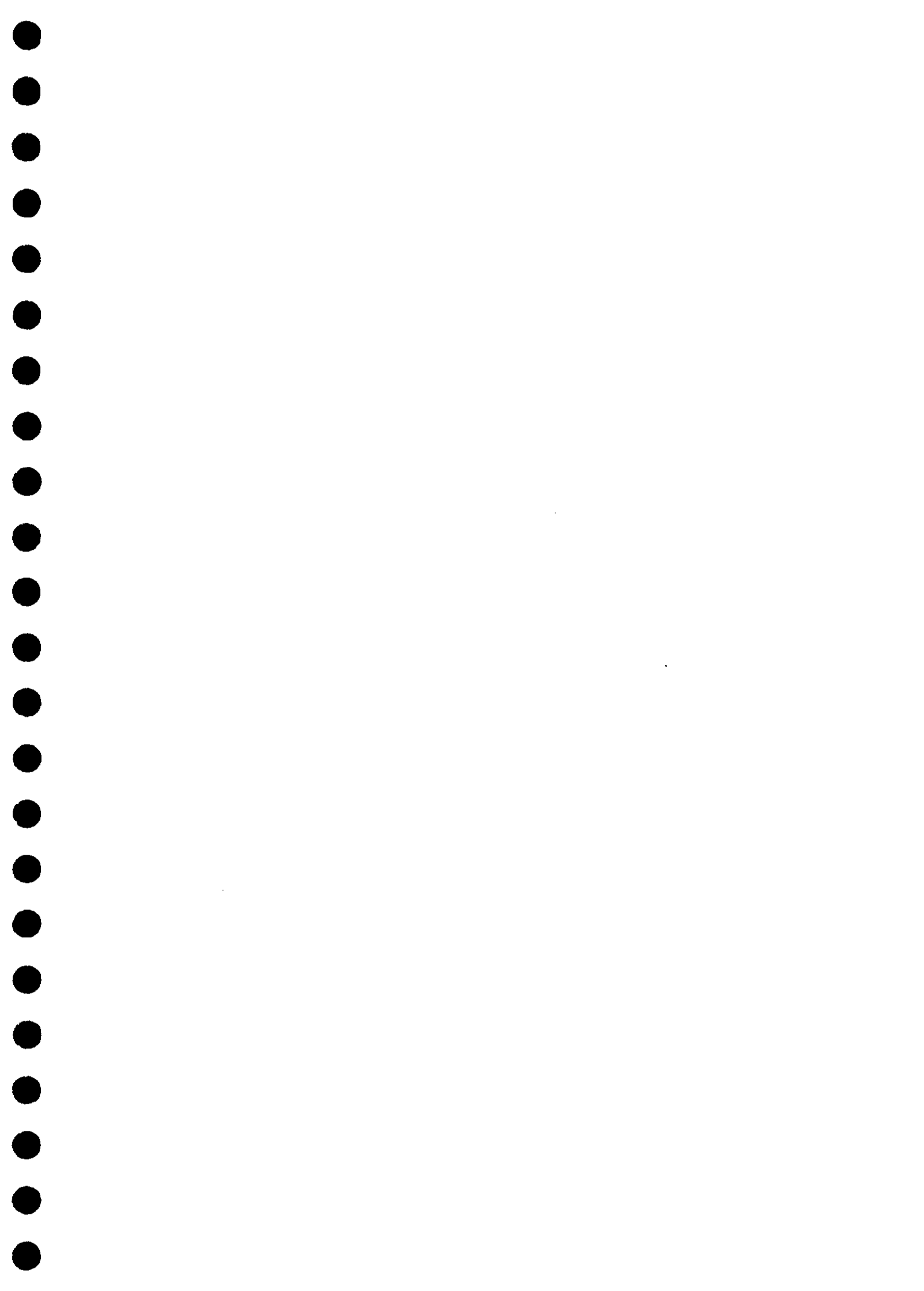
- What we have done today -

- ✓ designed an induction checklist
- ✓ made a list of the ways of paying for things
- ✓ identified places to keep your money
- ✓ discussed financial recording
- ✓ developed a budget
- ✓ evaluated methods of paying staff
- ✓ described the elements of a payslip
- ✓ demonstrated the workings of tax and NI
- ✓ identified sources of help
- ✓ Discussed this week's Activity Sheet - 'work out a budget for your personal finances'

- Next week -

Evaluating the course
and
Personal Action Plans

- Any Questions or Problems? -



<u>Time</u>	<u>Content</u>	<u>Activity</u>	<u>Resource</u>
12 noon	Outline of todays session	Talk through	OHP
12.15	Feedback from Budgeting activity	Feedback/talk through	Flipchart
12.30	Evaluation - what/why is it?	Brainstorm/Discuss	Flipchart
12.35	Has the course met your expectations?	Exercise/Discussion	Flipchart/handout
1.00	Lunch	Eating	Food and drink
1.30	About the training methods	Exercise/Discussion	Flipchart/handout
2.00	About the domestic arrangements	Exercise/Discussion	Flipchart/handout
2.20	Tea / coffee / orange / water etc	Drink	Refreshments
2.30	Personal Action Plans	Buzz groups	Handout
3.20	Tea / coffee / orange / water etc	Drink	Refreshments
3.30	Feedback from Personal Action Plans	Feedback/talk through	Flipchart
3.50	Bye Bye	Presentation	Handout

- Outline of the day -

- ◆ feedback from the Budgeting exercise
- ◆ an introduction to evaluating the course
- ◆ have you got what you wanted from the course?
- ◆ lunch
- ◆ your views on the training methods we have used
- ◆ your views on John Haswell House as a training venue
- ◆ producing a personal action plan to follow on from the course
- ◆ Bye Bye

- Budgeting feedback -

How did you find
the budgeting exercise

- is anyone bankrupt?

- Evaluation -

You tell us

what you thought
of the course.

For the future,
we need to know :

- 😊 what worked
- ☹ what didn't work
- 😊 what could be done better
- 😊 what we missed out

We will take notice of the things
you tell us and use them to make
the next course better!

- What did you hope to get from the course? -

? What did you hope to get from the course when you started it, 10 or so weeks ago.

? Have you got what you wanted.

? What did you find most interesting or helpful.

Handout / What did you hope to get from the course?

? What did you find least interesting or helpful.

? What, if anything, could we add to the course.

? What, if anything, should we leave out.

- Training methods -

? Think about the trainers. Is there anything they should do better or differently.

? You were given a lot of handouts during the course

- were they useful

- could you read them OK

- how could we improve them

? What did you think of the Overhead Projector slides

Handout / Training methods

? How could you have been more involved in discussions during the course

? Should we have gone into smaller groups more often

? What one thing would you change about the course

- The domestic bits -

- ? Is John Haswell House generally OK as a place to hold training**

- ? Was there enough Personal Assistance**

- ? Did you have any problems with access:**
 - to the building**

 - to the training room**

 - to and in the toilet**

Handout / The domestic bits

? In the training room, did you have any problems with:

- space

- lighting

- heating

? Could you see the Overhead Projector

? Could you see the Flipchart

? Could you hear everything

? Was the food OK

- Your personal action plan -

✍ I would like, in a years time, to be living

✍ I would need in order to live independently

✍ I might try after the course

✍ I'd like to explore further

✍ I would like more information about

Handout / Your personal action plan

 **I would like more training about**

 **I would like assistance with**

 **I would like help with completing my self-assessment chart**

 **I would like help with drawing up a care package**

 **I would like GPAP to**

Gateshead Personal Assistance Project



Don't forget, if you want any advice, information or support on anything to do with Personal Assistance get in touch with us :

Stuart Bracking or Ross Cowan

Gateshead Personal Assistance Project
John Haswell House
8/9 Gladstone Terrace
Gateshead
NE8 4DY

Telephone:

(0191) 477 3558 (voice)
(0191) 478 4082 (minicom)

Fax:

(0191) 477 1260

e-mail:

gpap@disabilitygateshead.org.uk

world wide web site:

www.disabilitygateshead.org.uk

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- Open College Accreditation -

When we were designing GPAP's ten week course, we decided to have it accredited through the Open College Network using the title 'Personal Assistance Users Skills'.

Open Colleges exist throughout the country. Their aim is to act as an awarding body and accreditation service for courses taking place in non-traditional educational settings such as community centres, voluntary organisations, at work and so on. People attending their accredited courses accrue learning credits which can be used in place of more formal qualifications to gain entry to other courses in adult or further education.

More details can be obtained from the:

National Open College Network
University of Derby
Keddleston Road
Derby DE22 1GB

tel: 01332 622 712 (voice)

It is important to note that there is a fee when a course is first accredited, and a moderator's fee each time a course is run. The initial cost will be around £250 to £300.

Developing an accredited course is a challenging but worthwhile exercise. The submission documents appear at first glance to be easy to complete, but thought and time is needed to design an effective programme.

In this section, we have reprinted the text from our submission documents. You are welcome to use this as a basis for your own programme.

It is important from the start to get guidance from your local Open College organisation before drafting your documents. The Open College will appoint a worker to advise you and to organise a Recognition Panel. This Panel will then choose a Moderator who will assess the first course.

The Open College worker will be able to tell you what language and words are used to distinguish between the different levels of learning.

The GPAP course is accredited at Levels 1 and 2. Although it was our aim for all learners to achieve Level 2, we were advised by our Open

Introduction to Open College Accreditation

College worker that it was a good idea to have a programme accredited at Level 1. This was in case an individual did not achieve the higher level. It is not possible for someone to be given an award for a level unless that level itself has been accredited. Someone cannot simply be awarded a Level 1 just because they did not achieve Level 2.

One point to note when developing a course is that it is possible to add other units to your course once it has been accredited. However, this will involve going back to the Open College and organising a second Recognition Panel. Therefore, it is important to think carefully about how you want to develop and use any course you may design.

- Open College Submission Form -

Title of programme?

Personal Assistant Users Skills

Organisation providing the programme?

Gateshead Personal Assistance Project

Number of weeks per run?

Ten

Number of hours per day / week?

Four hours class contact and two hours directed study per week

What is the programme designed to do?

a) Aims:

- (i) Introduce participants to the concept of Personal Assistance.
- (ii) Provide a supportive environment to allow people to make decisions.
- (iii) Help people to learn practical skills.
- (iv) Show course participants that employing personal assistants is a practical option for them.
- (v) Give participants the confidence to support each other as personal assistant users in the future.

b) Objectives

To give course participants the skills and confidence to:

- (i) decide what services and support they believe they need;
- (ii) determine which services and approach can best meet these needs;
- (iii) understand how to approach and secure funding from different agencies to pay for their support needs;
- (iv) understand how to find, employ and train a personal assistant;
- (v) understand the ongoing challenges that being an employer or user of personal assistants brings;
- (vi) and, know how to resolve difficult situations when they arise.

Who are the target groups? Please outline if there is a specific target group for the programme i.e. women, unemployed / unwaged people, minority ethnic groups, adults with learning difficulties or learning disabilities, etc.

Disabled people aged between 18 and 65.

Submission Form

Are there any entry requirements for the programme? If so state what skills / knowledge the learner will be expected to possess when they join the programme.

There are no specific entry requirements, but each participant will have acknowledged that they may need to use personal assistants sometime in the future and want to learn about the issues that may arise and develop the skills that they may need.

How are the learners recruited / selected for the programme? (e.g. interview, assessment of prior learning, open enrolment, referral, etc?).

Referrals and work with charities, voluntary organisations and social services' employees such as social workers and occupational therapists. Each course will be advertised in local newsletters and through a letter to those on GPAPP's mailing list. Also, the course will be promoted as one aspect of GPAPP's work when we do presentations to groups of Disabled people.

Does the programme include an induction period / session?

Before each course, a presentation will be given to those who have expressed an interest to allow them to make an informed choice. This will outline what issues will be included and those skills that will be developed on the course, and what teaching methods will be used.

What is the programme designed to lead on to?

- (i) Each participant will learn skills they can use when they decide to use a personal assistant to meet their need for physical assistance.

By taking responsibility for organising their own support needs and effectively supervising and supporting those people who will work for them, course participants will grow in confidence and develop skills which they can point to when they wish to apply for paid or voluntary work.

- (ii) Disabled people often lack the confidence to do mainstream college or adult learning courses because of poor educational experiences in the past caused by a lack of access and support. Completion of this course will help to restore participants' confidence in their ability to learn and utilise other courses.
- (iii) The programme aims to give individuals the flexibility to transform their life opportunities.

Submission Form

How will the programme be organised? Is the attendance full or part-time, day or evening? Does it include block placements or residential studies, large or small groups, flexi-study or individual study, use of drop-in workshops or community and outreach, etc?

The programme is divided into two units which last five weeks each. Groups of between four and eight Disabled people will come together for one session of four hours each week.

What is the total learner contact (taught) hours and directed study hours outside the taught time?

Each unit will involve 20 hours of class contact and 10 hours of directed study, making 40 hours and 20 hours respectively for the full programme.

Are programme meetings planned involving tutor(s) and organiser(s) and timetabled into the structure of the programme to ensure that effective programme monitoring and review take place?

Project meetings each week and each unit is reviewed as it ends.

If applicable, in what ways can learners negotiate changes in the course e.g. over content, learning methods, venue, etc?

Changes will be made to the course content, learning methods and timings as lessons are learnt during each time the programme is run. In session 5 of the second Unit, there is an opportunity for participants to give the tutors feedback.

How will learners be supported? What advice, support and counselling are provided before, during and after the programme?

One to one advice where needed, and support with completing Activity Sheets which participants will be given each week. Once the programme is complete, GPAP will assist each person to develop and implement a Personal Action Plan.

Are learners provided with a programme guide or information pack?

Before each programme is run, participants will be given a summary of what will be included in each session of the 2 Units.

Submission Form

Is the location suitable for the needs of the target group? What facilities are available e.g. free child / elder care, access for people with disabilities, non-teaching support, language support? What resources will be available to enable learners to meet the programme requirements e.g. open learning / practical workshops, library facilities etc? Is specialist equipment available for those with disability?

GPAP's parent organisation, Gateshead Council on Disability, is run by and for Disabled people, therefore all our activities and training take place in accessible venues and individual needs are met.

What financial assistance in the form of grants, travel expenses, etc., is available?

Transport will be provided free or mileage costs paid. Personal Assistance / childcare fees are paid.

Indicate the main learning activities in which learners will be involved:

- (i) **In supervised time e.g. lectures, tutorials, seminars, discussion groups, role play, practical work, visits, placements, etc.**

Discussion groups, brainstorming, role play, presentations and visiting speakers.

- (ii) **In directed learning time (outside taught hours) e.g. using the library, diaries, individual workshop activity, projects, essays, unsupervised practical work, etc.**

Activity sheets and practical work. Resources are available in a variety of formats depending on personal needs (including minority languages).

- Establishing and funding individual personal assistance needs -

Level 1

Learning Outcomes

The learner will be able to:

- (i) identify what Personal Assistance is;
- (ii) identify what assertive behaviour is;
- (iii) identify how a personal assistant will allow them to do tasks and activities they do not do currently;
- (iv) demonstrate an understanding of how to self-assess their own needs;
- (v) determine what is involved in making a complaint;
- (vi) demonstrate an understanding of how a Care Package is compiled.

Criteria for Assessment

The learner will have achieved these outcomes because they can:

- (i) define Personal Assistance;
- (ii) recall what is and is not assertive behaviour;
- (iii) produce a list of tasks a personal assistant will be able to help them with;
- (iv) produce a self-assessment of their Personal Assistance needs on a typical evening;
- (v) recall how to make a simple and appropriate complaint;
- (vi) produce their own Care Package with the assistance of the tutors.

Level 2

Learning Outcomes

The learner will be able to:

- (i) demonstrate an understanding of Personal Assistance and Independent Living;
- (ii) demonstrate an understanding of the difference between assertive, passive and aggressive behaviour;
- (iii) demonstrate an understanding of how to use personal assistants effectively;

Unit 1

- (iv) demonstrate an understanding of how to self-assess their own Personal Assistance needs;
- (v) demonstrate an understanding of how to make a complaint;
- (vi) demonstrate an understanding of how a Care Package is compiled and funded.

Criteria for Assessment

The learner will have achieved these outcomes because they can:

- (i) contribute to a discussion on Independent Living and Personal Assistance;
- (ii) illustrate the difference between assertive, passive and aggressive behaviour using examples;
- (iii) identify a list of tasks a personal assistant can help them with and explain what difference this would make to them;
- (iv) produce a self-assessment of their daily needs;
- (v) write a simple letter of complaint;
- (vi) produce their own Care Package and describe the different services that they could use.

Levels 1 & 2

Method of Assessment

The assessment, carried out by the tutor and the moderator, is variable and will include the following:

- (i) completion of exercises;
- (ii) demonstration of understanding through peer discussion;
- (iii) examination of course file;
- (iv) tutor observation.

Evidence of Learning

Evidence will consist of a file which may include the following:

- (i) a list of 5 things people say or do which annoy the learner;
- (ii) a list of 3 things the learner likes about themselves, 3 things they do well and 3 activities a personal assistant could assist them with;
- (iii) a complete self-assessment of the learner's Personal Assistance needs;
- (iv) a letter of complaint;
- (v) the learner's 'Ideal Care Package'

- Recruiting and employing a personal assistant -

Level 1

Learning Outcomes

The learner will be able to:

- (i) recall what information should be put in a job advert;
- (ii) identify questions they could ask when interviewing personal assistants;
- (iii) identify the kind of person they think would make a good personal assistant;
- (iv) identify what they would want to say to a new personal assistant about their job;
- (v) determine where they would want to keep their Personal Assistance funding;
- (vi) identify what they will do after the programme to meet their needs.

Criteria for Assessment

The learner will have achieved these outcomes because they can:

- (i) write a simple job advert;
- (ii) produce a list of 5 interview questions;
- (iii) produce a simple person specification;
- (iv) produce a simple induction checklist;
- (v) name in a group discussion where they would want to keep their funding;
- (vi) produce a Personal Action Plan with the support of the tutors.

Level 2

Learning Outcomes

The learner will be able to:

- (i) demonstrate an understanding of how to write a job advert and develop interview questions;
- (ii) demonstrate an understanding of what a job description and person specification is;
- (iii) demonstrate an understanding of how to induct a personal assistant;

Unit 2

- (iv) identify what is good and bad practice when disciplining a personal assistant;
- (v) identify the different ways that personal assistants can be paid;
- (vi) demonstrate an understanding of how to maintain good financial records;
- (vii) identify what they will do after the programme to meet their Personal Assistance needs.

Criteria for Assessment

The learner will have achieved these outcomes because they can:

- (i) write a job advert;
- (ii) choose appropriate interview questions;
- (iii) write a job description for a personal assistant
- (iv) write a person specification;
- (v) produce an induction checklist for a new personal assistant;
- (vi) contribute to a discussion about what is good and bad practice when disciplining a personal assistant;
- (vii) describe the different methods that can be used to pay a personal assistant;
- (viii) contribute to a discussion about how to ensure financial records are organised properly;
- (ix) produce a Personal Action Plan.

Levels 1 & 2

Method of Assessment

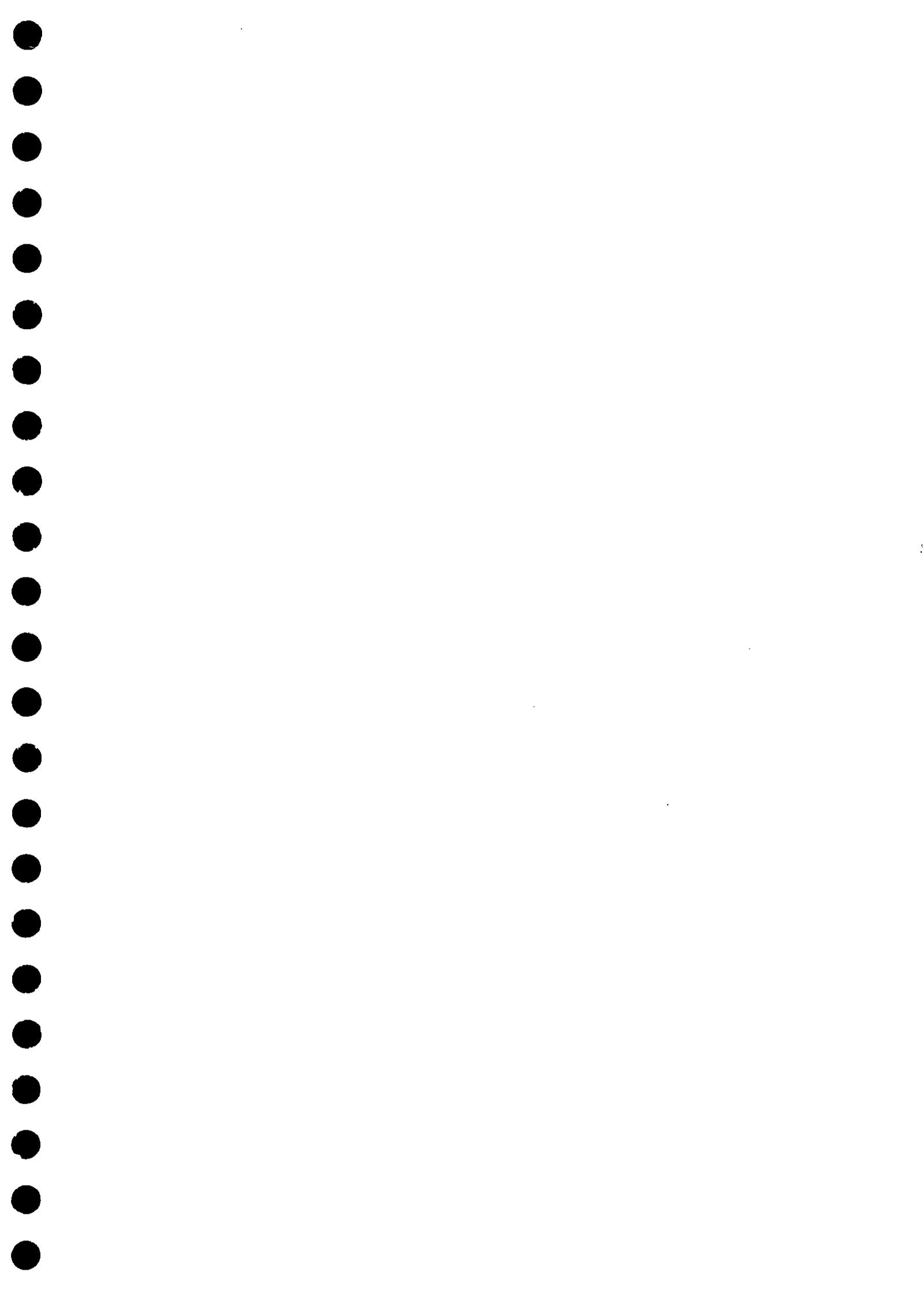
The assessment, carried out by the tutor and the moderator, is variable and will include the following:

- (i) completion of exercises;
- (ii) demonstration of understanding through peer discussion;
- (iii) examination of course file;
- (iv) tutor observation.

Evidence of Learning

Evidence will consist of a file which may include the following:

- (i) a simple advert;
- (ii) a list of interview questions;
- (iii) a simple person specification for a personal assistant;
- (iv) an induction checklist;
- (v) a budget for the learner's personal finances;
- (vi) a Personal Action Plan.



- PAPP Chats -

PAPP Chats were initially developed to meet requests from Disabled people who wanted to know a bit more about Independent Living and Personal Assistance but didn't want to commit themselves to a five or ten week course.

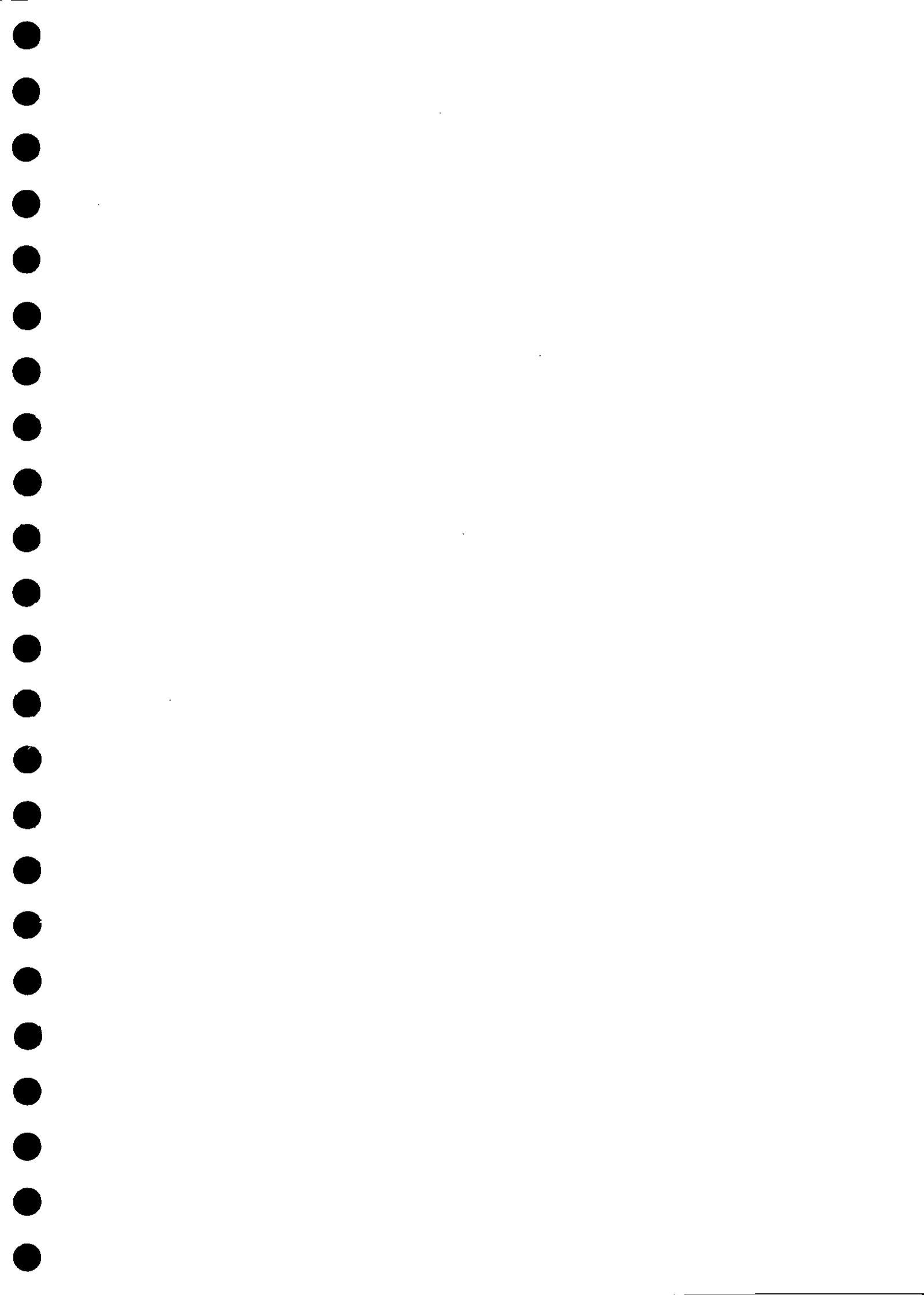
By the time we came to design the training there were a number of people around who had been through our longer training course. Also, the first people were starting to employ their own personal assistants. So the idea of a 'chat' was born.

The original sessions were designed less to be led by us, more to provide an opportunity for people - some more experienced than others - to chat around the issues raised and to learn from each other. We booked the room, set the scene and provided handouts to take away.

Each PAPP Chat has been designed as a stand-alone two hour session. We initially ran them 2 a month over 3 months but have since run individual chats on demand.

Some, such as the introductions to Direct Payments and the Independent Living Fund have been used as the basis for talks to voluntary organisations. These talks have increased with recent (end of 99) developments in the extension and promotion of Direct Payments to other groups. We have also used them for presentations to social workers.

The chat around Health and Safety led to the production of a short DIY guide 'Health and Safety in the home', incorporating many of the ideas which were raised at the first session. Copies of this can be obtained from the Council on Disability.



- Introduction to Personal Assistance -

1.00pm	Introductions / Tea and Coffee	
1.10pm	Johnny Crescendo Song	- Tape
1.15pm	Background	
	- the fight to get out of residential care	
	- History of American struggle	
	- Leonard Cheshire Homes	- Phil Mason
1.35pm	Led to people living in the community.	
	What problems did they face?	
	- housing	
	- money	
	- access	
	- support	
	- equipment	
	- physio	
	- caring attitudes	
	- abusive attitudes	
	- isolation	
1.50pm	One answer is Personal Assistance	
	What is Personal Assistance?	- handout
2.00pm	Refreshments	
2.10pm	Personal Assistance v Care	- NCIL Video
	What are the merits and problems of each approach?	
2.30pm	Being in Control	
	a) what worries do you have?	
	b) what solutions are there?	
	c) what support / training would you need?	
2.50pm	Summing up	

- Le Court Cheshire Home -

its place in the history of Disabled people in England

This tale is based on an article written in 1990 by Phil Mason. It is a brief history of the struggles for independence and control faced by Disabled people who lived in the first Leonard Cheshire Home. It covers the period from 1948 to 1974, with the main events taking place during the late-50s to the mid-1960s.

It has been written to draw attention to those courageous and principled Disabled people who played an early and important part in the story of our shared struggle for more control over our own lives.

The First Days

At the end of the Second World War, Leonard Cheshire had tried to establish a self-help community at Le Court House in Hampshire, a large country house with plenty of agricultural land. This idea quickly failed due to lack of money and the debts were paid by selling off the land, leaving Cheshire with "the big house".

In 1948, Arthur Dykes, one of the earlier participants in the self-help community who had left when it ran into financial problems, was admitted to a local hospital where he was diagnosed as being terminally ill. The hospital contacted Cheshire and asked if he could help to find a nursing home for Arthur. Unable to do so, Cheshire offered to take Arthur in himself and care for him and he is often now described as the first "Cheshire Home Resident".

New self-help community

This soon led to the development of another kind of self-help community, except that this time the residents were "patients". A variety of sick and Disabled people came to Le Court, mostly of their own initiative and they kept themselves by their own efforts. Each did something.

Some washed up, some cooked, some mowed the lawns, some did the shopping, and some tried to raise the funds necessary to cover their costs. Everyone took part in the running of the Home.

This was to prove significant for what follows in that, from the beginning, the residents expected to be involved in the day to day management of their home.

Management Committee

As time progressed, Leonard Cheshire became interested in other things and Cheshire's father felt it necessary to establish a Management Committee, composed of local dignitaries, to take on the responsibility of managing the House and the funds that had been raised through donations. The idea was that this would give the venture "respectability".

Financial Security

Arthur Dykes had arrived at Le Court in the year that the National Health Service (NHS) was born and, eventually, the NHS began to provide funding for many of the residents. This was obviously more secure than relying on charitable income but it was to lead to pressures from the authorities to conform to Nursing Home standards and regulations.

At around the same time, the "big house", a Victorian mansion, had to be replaced as it was being undermined by an underground stream. In 1952 a new Home was purpose built with a grant from the Carnegie Foundation.

Parallel developments

There now followed an odd period of parallel development within Le Court. It had gained a reputation for being the place where Disabled people could lead their own lives and many independent minded people asked to be housed there.

At the same time, the Management Committee of the Home was trying to conform to medically orientated practices and the strict nursing home rules of the day. They appointed a Warden and the Matron to enforce their ideas of how the home should be run.

Tensions

Tensions soon developed. On the one hand were the Warden and the Matron, the appointed arm of the Management Committee. On the other were Peter Wade and Paul Hunt, the elected Chairman and Secretary of the Residents Association.

These tensions came to a head on two major occasions. In 1956, the residents proposed a "Works Council", made up of staff, residents and Management Committee, as a way of ensuring consultation in the running of the home. This was rejected out of hand and the residents refused to co-operate with the staff, going on a silent protest, until 1958 when some of the rules were eased.

Pyjama strike

The second action was in 1962 when the Management Committee threatened to "expel" Peter Wade. A new matron had started and she was gradually re-introducing some of the petty hospital routines and rules done away with in 1958. An early skirmishes was to do with a rule insisting that anyone requiring staff help to change into their pyjamas must get changed before the Day Staff finished work at 6 o'clock. The residents agreed to resist this rule together and on a chosen date all refused to co-operate with staff and would not allow themselves to be changed into their pyjamas.

However the real crunch came one dinner time when the Warden and Matron read out the following rules without any prior discussion or consultation:

- i) All TVs off by 10.30pm.
- ii) Everyone needing help to be in bed by 11.00pm.
- iii) Residents wishing to go out after dark must ask permission.
- iv) No public exposure of bodies in hot weather.

Peter Wade broke the silence that followed this announcement with a loud "Rubbish!". The Warden ordered him to leave the room and when he refused a member of staff was instructed to wheel him out. Peter is reputed to have eyed the person indicated and said, "Lay a finger on me and I'll kill you!" Later, when things quietened down, Peter left the room of his own accord.

Expulsions

Infuriated by this defiance the Warden then took steps to have Peter expelled from the Home. Intense anger about this threatened expulsion spread amongst the residents. Within days there was an escalation of tension and resentment and the split between the Management and the residents widened. The Warden, supported by the Management Committee, decided to "punish" a group of residents particularly identified with Peter's stance. These "ring leaders" were also given notice of eviction from the Home.

Leonard gets involved

Appalled by this decision, the residents, and a growing number of their supporters outside the Home, appealed to a variety of authorities, including Leonard Cheshire who, after considerable persuasion, eventually became involved.

One of his first proposals was that the six "ring leaders" be given a gift of £1,000 which would enable them to leave and set up their own home. They were tempted but felt they were being bought off. They also felt that they would have been abandoning everyone who remained. The offer was refused.

Possibly fearing adverse publicity in the press, Leonard Cheshire eventually responded by telling the Management Committee that a Cheshire Home was a home for life.

That meant that residents could not be evicted and was seen as a major 'victory' for the Residents Association.

New Committee

Following this, the Management Committee was disbanded and a new Chairman was appointed and charged with the task of working with the residents to find solutions to the issues which had been causing the tensions.

The long standing complaint of the residents was that they had no role over what happened in the Home. This inevitably meant that they had no control over what happened in their lives.

The new Chairman of the Management Committee chose to co-operate with the residents in order to develop ways to include them in decision making. But it was not until 1965, eight years after the original "Works Council" proposal, that the Management Committee finally, for a trial period, agreed to the inclusion of two residents on the Committee.

The prize for eight years of consistent and persistent struggle.

Model home

The pendulum had begun to swing. Residents gradually became involved in every aspect of life in the Home. Such was the transformation that in 1974, 17 years on from the "silent" action, one resident who had been involved in the struggles said that all the battles had been won and that there was nothing left to do. The Le Court Home came to be seen as a model Residential Home to be emulated by other Homes.

New issues, changing times

However, by the time the reforms were complete, many Disabled peoples' aspirations had moved away from controlling their Residential Homes and on to the issues facing them in the world outside.

Paul Hunt and Peter Wade were both to leave Le Court and take on very different challenges. Peter joined the management committees of the Leonard Cheshire Foundation and RADAR, eventually becoming a Trustee in both. He believed that by joining existing orthodox disability organisations he could change them from the inside.

Paul went on with others to found the Union of the Physically Impaired Against Segregation (UPIAS). Paul felt that the disability charities of the day, by focussing on Residential Care, were basically wrong. He saw disabled people's place as being in the community. In addition, Paul felt that these existing long established "disability" organisations did not reflect the interests of disabled people and that disabled people should organise and form their own organisations.

Our history

Such a brief summary can only provide a simplified version of events. Certainly the text has not give any sense of the atmosphere that existed in the Home during the difficulties: the Management oppression; the resident's vulnerability; the fear; and their solidarity and courage.

It would also be untrue to characterise it all as struggle and strife. Of course there were good times as well as bad and, of course, there were bad people as well as good.

We believe this story needs to be told and its significance recognised in order that Peter Wade and Paul Hunt, as well as their many unnamed associates, their fellow residents and their supporters, can take their place in the history of the Disability Movement.

They are a part of our shared history, the story of people who refused to accept the conditions society put on them and who, by acting together, brought about changes. Changes that benefited themselves and subsequent generations.

These are our heroes. Let us not forget them.

- Personal Assistance -

means that Disabled people who require physical and cognitive support (whether in their personal, domestic, social, educational or employment activities) should have the right to buy, manage and control enough of that support to lead as full and spontaneous a life as a non-disabled person.

Personal Assistance allows a Disabled person to choose and employ their own personal assistant, to do what they want, when they want it done.

Personal Assistance enables a Disabled person to:

- ✓ live in their own home
- ✓ have personal and social relationships on equal terms
- ✓ fulfil their role as a parent or partner
- ✓ have access to education
- ✓ take on work
- ✓ participate in the social and political life of the community

- Care v Personal Assistance-

- ▶ **Care** is about having services provided and delivered in a way which suits the carer.
- ▶ **Personal Assistance** is about Disabled people controlling their own resources and support staff. Staff are known as personal assistants.
 - ▷ In the **Care** approach, the carer decides what work tasks need done and when they will do them.
 - ▷ In the **Personal Assistance** approach, the Disabled person gives instructions to their personal assistant.
- ▶ In a **Care** situation, the carer is responsible for protecting their own health and safety.
- ▶ In the **Personal Assistance** situation, a personal assistant works under the direction of the Disabled person to ensure that health and safety issues are considered and that effective risk assessments are made.

You are given care.

You control personal assistance

It's My Life - an introduction to....

Independent Living

Independent Living is when Disabled people enjoy the same opportunities to live and participate in the community as non-disabled people, free of any forced dependency upon their family or friends, and can exercise choice and control over the decisions affecting their own lives.

As a philosophy, it is based on four assumptions:

- ❶ all human life is of value;
- ❷ anyone, whatever their impairment, is capable of exerting choices;
- ❸ people have the right to take control over their lives;
- ❹ Disabled people have the right to participate fully in society.

"Independent living is used in a practical and common sense way to simply mean being able to achieve our goals. The point is that independent people have control over their lives, not that they perform every task themselves. Independence is not linked to the physical or intellectual capacity to care for oneself without assistance ; independence is created by having assistance when and how one requires it."

Simon Brisenden in 'Charter for Personal Care'

This idea developed amongst Disabled people themselves as a response to the discrimination and exclusion they experience when they wish to live in the community or take part in those mainstream social, cultural or leisure activities non-disabled people are able to take for granted.

Personal Assistance

Personal Assistance is about the right of Disabled people who require physical and/or cognitive support (whether in their personal, domestic, social, educational or employment activities) to buy, manage and control enough of that support to lead as full and spontaneous a life as a non-disabled person.

Personal Assistance allows a Disabled person to choose and employ their own personal assistant, to do what they want, when they want it done.

Personal Assistance enables a Disabled person to:

- ✓ live in their own home;
- ✓ have personal and social relationships on equal terms;
- ✓ fulfil their role as a parent or partner;
- ✓ have access to education;
- ✓ take on work;
- ✓ participate in the social and political life of the community.

Personal Assistance and the Care model

Personal Assistance is therefore very different from the traditional Care model of looking after Disabled people.

Care is about having resources provided and delivered in a way which suits the provider or carer.

Personal Assistance is about Disabled people controlling their own resources and support staff. Staff are known as **personal assistants**.

In a **Care** approach, the carer decides what work tasks need done and when they will do them.

In a **Personal Assistance** situation, the Disabled person gives instructions to their personal assistant.

In a **Care** situation, the carer is responsible for protecting their own health and safety.

In contrast, a **personal assistant** works under the direction of the Disabled person to ensure that health and safety issues are considered and effective risk assessments are made.

You are given care.

**You control
Personal Assistance.**

Personal Assistance and Care are influenced by different approaches to Disability, the social and medical models respectively.

What is Disability?

There are two definitions of disability, one called the **medical** or **individual** model and the other called the **social** model. The social model is preferred and used by organisations and groups controlled by Disabled people.

The Medical Model

According to the medical model, as seen in the World Health Organisation's definition of Disability given below, the individual Disabled person is seen as the problem.

"Disability is any restriction or lack (resulting from an impairment) of ability to perform an activity in the manner or within the range considered normal for a human being."

World Health Organisation

This model views the body as sick or defective and as being in need of a cure. It believes Disabled people are sometimes physically unable to do those everyday activities that non-disabled people can take for granted.

It is therefore seen as better - or more 'normal' - for a person to be able to stand and walk, even if slowly and with difficulty, than to get around more quickly and comfortably using a wheelchair.

The **problem** with the medical model is that it only highlights some of the things which disable a person and puts all the emphasis on the individual.

Handout / 'It's My Life'

Therefore Disabled people can end up saying:

"I cannot get involved in the youth club committee because I cannot hear"

"I cannot go to my school because I use a wheelchair and it has lots of steps and narrow doors"

"I cannot get a job because my cerebral palsy stops me getting on the bus to get to work"

Organisations who use the medical model of disability believe the solution to these problems is to be able to offer individual medical aids or operations which would enable the person to become more mobile or 'normal', or otherwise teach someone to accept their lot.

The Social Model

This model is an entirely different approach to disability from the medical model.

It comes from Disabled people's own experiences and is used by Disabled people's organisations.

It accepts that Disabled people have medical conditions which may inhibit them and which may need medical treatment from time to time.

But it goes on to argue that most of the day to day problems that Disabled people face are caused by the fact that they live in a hostile, disabling world which is largely designed to suit non-disabled people.

"Disability is the disadvantage or restriction of activity caused by a society which takes little or no account of people who have impairments and thus excludes them from mainstream activity. (Therefore disability, like racism or sexism, is discrimination and social exclusion.)"

**British Council of
Organisations of Disabled
People**

An inability to walk is an impairment; the inability to get to the first floor of a building because there is no lift is a disability.

An inability to move one's body is an impairment but an inability to get out of bed because suitable physical or mechanical help is not available is a disability.

Under the social model, Disabled people have **impairments** which affect their bodies. The **Disability** is the disadvantage or lack of opportunity caused by the social, physical and attitudinal barriers which society places in their way.

The social model allows Disabled people to say:

"I can't get on a bus because it is not accessible".

"I can't get a decent education because my local college does not support me properly".

"I can't live independently because not enough accessible homes are being built"

Handout / 'It's My Life'

"I can't have a personal assistant because my local council will not pay for the assistance I need".

It is possible to see the results of Disability oppression and discrimination around us.

- ✗ Disabled people are more likely to be out of work than non-disabled people;
- ✗ special schools are still often the only option for Disabled children;
- ✗ Disabled people are unnecessarily segregated because of a badly designed built environment (high kerbs, steps, narrow doors, poor lighting and so on);
- ✗ people assume Disabled people can't do things or choose to tell them what is best for them.

Using the social model, Disabled people are able to identify the factors which disable them and can choose to work towards doing something about them.

They can feel good about themselves when their lives are not going well.

Disabled people can say it's not me or my body that is at fault, but the society around me.

By helping to draw attention to the barriers in society, the social model offers solutions which are wider than trying to change the person or curing the individual's impairment.

The Disabled person ceases to be a tragic failure and can be seen as someone who is discriminated against by the way society is organised.

"The most common causes of disability world wide are poverty, economic exploitation, pollution, war and torture. Disabled people are the poorest of the poor. The barriers we face are more than attitudinal or architectural, they are institutionalised in our legislation and in our social practice which ascribes to Disabled people the status of receivers and not providers. Our starting point then, is a political one."

Christine Wilson quoted in 'Disability Equality in the Classroom'

The growth of independent living

There have been a number of important influences and developments in society that have shaped the emergence of Independent Living.

Revolt in residential homes

From the early 1960s, some Disabled people living in residential homes began to raise the idea that they should be allowed to live in the community with paid support to meet their personal and domestic needs.

A move away from institutionalisation

Partly as a result of this pressure, there was a growing recognition by policy makers that Disabled people with severe impairments can function effectively in the community with the right support. They also came to accept the dehumanising effects of institutionalisation on individual Disabled people.

Developing community based services

Change in attitudes led to the development of community based services, such as Homecare. Initially provided to meet the needs of ex-hospital residents, particularly those leaving large mental health institutions, it also led to service provision for those Disabled and older people who had always lived in the community.

Prior to the 1970s they had relied upon family support or their own financial resources or did without.

The American experience

In America, from the early 1970s, there was a rapid growth of Centres for Independent Living (CILs). A CIL is a local centre or organisation under the direct control of Disabled people. It aims to provide the support and services Disabled people need in order to live independently and be personal assistant users.

This development started in California after Disabled students, who used assistants to meet their needs, demanded and won the right to live in the community after their studies ended.

Britain establishes its own CILs

In the early 1980s, following visits to America by Disabled activists in this country, CILs started in Britain.

They were initially developed in Hampshire and Derbyshire where there were significant number of Disabled people who had moved, or who were in the process of moving, from residential homes or were already living independently.

An important feature of the Hampshire CIL was that its founders had gained control of the money which had formerly been paid by their local authority to keep them in residential care.

Self-organisation

The 1970s saw the development of new social movements such as the women's movement which were based on self-organisation.

This approach was taken up by a number of Disabled people in Britain from the mid-1970s. They established the idea that Disabled people were capable of staffing and managing their own organisations, including CILs.

Individual pressure

More and more individuals began to demand the right to live independently as Disabled people's expectations and involvement in society began to rapidly change.

This was particularly true of young Disabled people who had moved away from their parental home after attending college or university, and those who became impaired after an accident or illness and wanted to continue pursuing an active life.

Use of volunteers

In the 1980s, responding to the demands of Disabled people who could only live in the community if they had access to personal assistants, Community Service Volunteers set up a scheme which allowed Disabled people to have access to live-in personal assistants.

These personal assistants were only paid pocket money, but received their board and lodgings.

National demonstration

As more and more Disabled people employed their own p.a.'s, pressure grew for a proper, nationally funded scheme. There was a large national demonstration in London in 1988, after the Social Security Act had abolished the Domestic Assistance Addition, which some Disabled people had used to employ p.a.'s.

Independent Living Fund

Finally, in 1988, the government responded to the pressure and established the Independent Living Fund (ILF). This was an independent body, funded by the government, to which Disabled people could directly apply for a weekly payment.

This money was used to pay for personal assistants rather than having to rely upon volunteers. Disabled people could now directly employ their own staff or use agency workers and many were able to put together quite complex packages.

Demand explodes

Initially the ILF had a budget of £5 million a year and was designed to help 400 to 500 Disabled people of all ages. There was a slow uptake in the first year, and then the demand exploded.

By the end of 1992, the ILF was spending £97 million on about 18,000 people, many of whom had a chance to have their needs met properly for the first time.

Independent Living Fund ('93)

Government concerns about how much this was all costing led to major changes in the ILF in 1993.

The original ILF was closed down and those receiving payments from it were transferred to the Independent Living (Extension) Fund. These people continue to receive payments from that fund in the same way.

A second fund, the Independent Living Fund '93, was established for new claimants. Disabled people now have to apply through their local Social Services department. To qualify, Social Services have to:

- ✱ supply them with more than £200 of services a week;
- ✱ agree to put in an application to the ILF on their behalf.

Social Services policies on the use of ILF vary considerably and many do not see its potential. This, consequently, leads to great variation in the use of personal assistants throughout the country.

Also, local authorities could not, by law, directly pay Disabled people the cash equivalent of the first £200 of services. They either had to provide the service themselves or, if they wanted to provide a cash equivalent, were obliged to use an indirect scheme such as a non-charitable trust or an Independent Living organisation.

This created practical difficulties and removed choice and control from some Disabled people.

Community Care (Direct Payments) Act 1996

The new ILF rules often meant an unsatisfactory mixture of ILF cash and services from the Social Services was being provided.

This led to demands from Disabled people and some local authorities for a more flexible system of providing payments.

The Direct Payments Act was the government's answer.

The Social Services department still carries out an assessment of a Disabled person's needs. However, instead of the local council directly providing or arranging services to meet those needs they make an equivalent cash payment - a Direct Payment - to the Disabled person. They can then use the payment to arrange their own services.

This Act is a further step forward but it still leaves a number of problems for Disabled people.

The option of making Direct Payments is discretionary rather than mandatory. It is up to local authorities to decide when and how to implement this Act.

They can choose the rules for assessing which individuals are "willing and able" to enjoy the opportunities afforded by the Act. This assessment will be very different from authority to authority.

On the positive side though, recent research indicated that all but four local authorities in England and Wales are considering making Direct Payments available.

What Disabled people have achieved

The last 20 years have seen significant improvements in the opportunities available to Disabled people

- ★ residential care is no longer the main option for Disabled people needing assistance.
- ★ there has been an acceptance that Disabled people can choose, if they so wish, to live independently in the community.
- ★ Disabled people have won the right, at least in some areas, to design and manage complex care packages.
- ★ there has been an acceptance by the government, with the introduction of Direct Payments, that Disabled people can handle money.
- ★ Direct Payments have been extended to all Disabled people, from the age of 16 and with no upper age limit.
- ★ with the introduction of the Disability Living Allowance, the Independent Living Funds and Direct Payments more money is available to Disabled people who want to fund a Personal Assistance package.

Disabled people can now

- ✓ live independently
- ✓ have access to support workers
- ✓ and choose a Personal Assistance approach.

Problems remain

- ☹ a number of local authorities have yet to introduce any form of Direct Payments scheme.
- ☹ several local authorities are insisting on the use of 3rd party organisations to provide services. They are refusing Disabled people the choice as to whether they can directly employ someone.
- ☹ very few local authorities are considering offering Direct Payments to those with a learning difficulty and those who experience emotional distress.
- ☹ some local authorities have a poor record in applying to the Independent Living Fund on behalf of their Disabled residents and deny them, and their own Social Services departments, a valuable source of funding.

The way forward

- ☺ provide Direct payments to all who would benefit from them, whatever their impairment.
- ☺ offer Disabled people a real choice between local authority services, 3rd party provision and individual control.
- ☺ establish a network of support schemes throughout the country which could provide the training, advice and support that many Disabled people need in order to make Independent Living a realistic choice.

Some further reading

If you would like to read more about Independent Living and Personal Assistance, we would recommend the following publications.

All of these books and guides are in the Council on Disability's reference library at John Haswell House.

The library is open for public use every weekday morning from 9.30 to 12.30. It can also be used in the afternoons if you arrange a time in advance.

 **Independent Lives**
by Jenny Morris.

Combining a disability rights and feminist perspective, this book examines Disabled people's experiences of community care and challenges the traditional care approach.

 **What do I want to do?**
by GPAP


A DIY guide to self-assessment for Disabled people working out what Personal Assistance they might want. Free copies available.

 **Recruiting a personal assistant** by GPAP

A guide for Disabled people planning to recruit a personal assistant including information on job descriptions, application forms, advertising and so on. Free copies available.

 **Independence Newsletter**
by PAIN/GPAP


The newsletter of the Gateshead Personal Assistance Information network. Sent out free bi-monthly to Disabled residents of Gateshead.

 **Personal Assistance Users Newsletter**
by BCODP Independent Living Sub-Committee

News and views about Personal Assistance written by and for Disabled people.

 **Direct**
by Hampshire CIL

A monthly newsletter by one of the first Independent Living schemes in the country. Full of tips and discussion points from Personal Assistance users.

 **A Guide to Receiving Direct payments**
by Department of Health

A good introductory guide to Direct Payments, written for Disabled people. Free copies, including a BSL version, available.

 **Funding Freedom**
by Values into Action.

A good concise guide to making Direct Payments to people with learning difficulties.



- Finding a Personal Assistant -

1.00pm	Introductions / Tea and Coffee	
1.10pm	What is a personal assistant	- Discussion
1.20pm	What qualities would you want from your personal assistant	
	- reliable	
	- easy going	
	- friendly	
	- skilled	
	- trained	
	and so on	
1.30pm	What qualities wouldn't you want?	
	Tell us your horror stories	
1.40pm	What can't a p.a. do?	
1.50pm	Do you need to pay to have control?	
2.00pm	Refreshments	
2.10pm	Where can you get personal assistants?	- Handout
	- Agencies	
	- Home Care scheme	
	- Volunteers	
	- Community Service Volunteers	
	- Family / Friends	
	- Direct Employment	
	- Foreign Students	
	Hourly and Live-ins	
2.30pm	What are the pros and cons?	
2.50pm	Summarise	

- What makes a good personal assistant -

- ✍ trustworthy
- ✍ skilled
- ✍ trained
- ✍ flexible
- ✍ sense of humour
- ✍ shared interests
- ✍ sensitive to my needs
- ✍ self-motivated
- ✍ competent and confident
- ✍ must like football
- ✍ physically fit / strong
- ✍ easy going
- ✍ driver
- ✍ must have respect for me
- ✍ must never patronise
- ✍ reliable
- ✍ good time-keeper
- ✍ encouraging and supportive
- ✍ honest with me about how they feel
- ✍ non-smoker in my presence
- ✍ if I am, they should be a vegetarian
- ✍ should like visiting pubs
- ✍ pet lover / pet tolerant
- ✍ known to me

- What makes a bad personal assistant -

- X your p.a. ignores how you want tasks to be done
- X your p.a. does not respect your dignity or privacy
- X your p.a. talks about other people they work for
- X your p.a. makes decisions for you, such as deciding what you will eat or wear
- X in social situations, your p.a. speaks for you
- X people generally ask questions of your p.a. rather than you
- X if you speak, you find that your p.a. contradicts what you say
- X your p.a. actively refuses to do things for you, such as suggesting you wait till you get home before you go to the toilet
- X generally, you feel that you are not really in control of your own life

- Where to get a Personal Assistant -

Recruit someone directly yourself

You may feel that in the long term it would be best to directly recruit your own personal assistant(s). GPAPP can help you to write an advert, produce a job description and application form and, if you wish, interview people.

If you get Direct Payments, some money is included to cover the costs of advertising etc.

The main options at the moment for recruiting people locally are :

Job Centres

The Job Centres in Gateshead (tel: 451 4234), Birtley (tel: 451 3511), Blaydon (tel: 451 6900) and Felling (tel: 451 6800) will place an advert in their display racks free of charge. They do sometimes rewrite adverts to fit the house style so try to make sure that they understand the job you are offering - you are not looking for a nurse to care for you!

You can phone, fax or post your advert to the Job Centre but if you can, it's usually best to visit. You can then discuss your requirements and make sure the advert says what you want it to.

Local newspapers

The Evening Chronicle, Gateshead Post and the free papers all carry job adverts. You will have to pay for the advert, per word, so make sure you keep it as concise as possible. Details of how to advertise are given in each newspaper.

Disability Magazines

Magazines read by Disabled people, such as Disability Now and Forward (the Magazine of the Spinal Injuries Association) are also read by people looking for jobs. People have been successful in recruiting personal assistants by advertising in them. However, given they have a national readership, they are probably best only used if you are looking for someone to live-in with you and are offering full-time work.

By word of mouth

Ask friends, family, other people who use personal assistants, work and social colleagues to spread the word that you are looking for staff. They may already know someone who would be interested in working for you.

Handout / Where to get a personal assistant

Local students

You can advertise for a personal assistant on notice boards in the college. A large number of students, attending full-time and part-time courses and covering a wide age range, attend the college. Most of them will be keen to earn money and many will be willing to learn new skills, so the College is often a good source of potential personal assistants.

Send your advert to the college, with a covering note asking them to display it, at the following address :

Gateshead College
Durham Road
Gateshead
NE9 5BN

Nursing students

Again, there are a large number of nursing students working at the Queen Elizabeth Hospital who are always keen to earn extra money and can usually be trained up to make ideal personal assistants. There are notice boards within the hospital that you can advertise on. The main problem is that the nurses are usually based in Newcastle and tend to live there, so you may find that you have to pay travel expenses.

Notice boards

All the large supermarkets (Tesco's, Sainsbury's, KwikSave) have notice boards where you could advertise for a personal assistant free of charge. Local shops, newsagents and Post Offices will often display small adverts for a small fee.

Brokerage

Brokerage is basically where you manage a personal assistant but you pay a fee to another organisation - such as Leonard Cheshire or Age Concern - to do the advertising, arranging and employing for you. You would still be involved in the interviewing.

With some organisations, you can also choose to be the employer. In this case you could, if you wish, ask the 'broker organisation' to pay the wages, tax and NI and so on.

Unfortunately, no one offers this service in Gateshead at the moment but, once funding becomes available to more people, we expect brokerage to take off and we will provide more information to anyone who is interested in this idea.

Using an Agency

There are two types of agency that can help you to find a personal assistant.

General Recruitment Agencies

These specialise in finding any type of worker, mainly for companies and usually on a temporary basis - hence the word 'Temps'. Pay them a fee and they will try and find you a worker. You would have to make sure that they understand both the tasks involved and the attitude required to do the job as they may not understand what a personal assistant is.

Using this kind of agency can work out expensive and there is no guarantee that they will find you someone suitable.

Nursing or Domiciliary Care Agencies

These agencies specialise in providing you with a personal assistant who can carry out a range of personal assistance / support tasks (including nursing care if you wish) in your own home.

They recruit and interview the workers and pay the wages etc. They charge you an hourly fee on top of the personal assistant's wages (usually about half the wage rate) for providing the service.

Again they work out expensive and would certainly cost more than the current Direct Payment rate but several people who get the Independent Living Fund do successfully use agencies to provide much of their care package.

Once you get to know the staff working for the agency you should be able to have some choice over who they provide you with. However, particularly in your early days, you will have to take pot luck. Also, there are a limited range of Agencies who can provide staff in Gateshead. There has never been the demand before but hopefully this will change in the near future.

The more hours you are offering the more chance you stand of finding an agency to provide you with workers.

There are also national agencies who specialise in providing live-in and 24 -hour care packages. These are usually priced at around £500 a week, the highest levels of funding got through the Independent Living Fund. GPAP can provide you with details of these.

Social Services Home Care

You do not necessarily have to pay or directly employ someone in order to have a satisfactory working relationship with them. It should be possible to work with a home care worker supplied by social services to develop more of a personal assistance relationship with them, where you feel more in control of what they do and how they do it. You can also ask for a worker to be replaced if you are not happy with the one(s) you are first sent.

GPAP are producing a booklet on working with your personal assistant which gives some tips on how to do this. However, do remember that using home care can never give you the amount of control, particularly over when the service is provided and what is done, that employing your own personal assistant will.

Home Care workers are supplied following an assessment of your needs by social services. You can arrange an assessment (or a re-assessment if you've been turned down in the past or are not happy with the hours/service you get) by contacting either your local social services office or the main office dealing with Disabled people on Prince Consort Road, tel: 490 1616 (voice and minicom).

Community Service Volunteers

Community Service Volunteers is a national charity which arranges opportunities for people who want to do voluntary work in Britain, usually away from their home, usually full-time and normally for anything from 4 months to a year.

They run something called "Independent Living Projects" where you can arrange to have one or more CSV volunteers living in your home and providing you with anything up to 24 hour, 7 day a week support. They will basically act as your personal assistants.

The costs to the Disabled person for 1998/99 were as follows :

- One-off setting up fee : £352.50
- Annual retainer for each volunteer : £1,896 each for first two volunteers (equivalent to approx £36.50 a week), £948 each for next three.
- Weekly allowance given to each volunteer : £24
- Weekly Food Allowance : £29.50 (or provide all meals)
- All accommodation costs, including heating and lighting
- Local travel and out of pocket expenses whilst working for you

Handout / Where to get a personal assistant

- Travel from their home at start of scheme and to their home at the end of the placement with you.
- Plus, one weeks holiday for every four months they are with you - you pay them return travel costs to their home, one weeks allowance and one weeks food allowance.

We don't know anyone locally who has used the scheme. Clearly you have no choice over who you are provided with. You must also have enough room to put people up. Finally, you cannot exploit someone by expecting them to cover too many hours. Most of the example schemes seem to involve at least volunteers living in.

Contact GPAP if you would like more information about Community Service Volunteers.

Volunteers

If you have no money at all or are looking for someone to help you with those extra things that your care package doesn't cover, you could try advertising (see the section on 'Recruiting your own') for people to be your personal assistant on a voluntary basis - either free or for basic expenses. People may be willing to do it as a way of gaining experience before they go on to do paid employment or a college course. The problem is that it is sometimes difficult to rely on volunteers - they could disappear overnight if a better offer came along.

Family and Friends

Many Disabled people use family and friends to provide part of their personal assistance. Sometimes, this is because they have no choice - their social services care package is so small that are forced to rely on them to survive. Others positively prefer to use people they already know and are close to, particularly if they need assistance with personal and often intimate tasks .

Sometimes it works, sometimes it doesn't. It can be difficult enough for you to give orders to someone without them being your father or a close friend. It can also be difficult for them to let you take risks or make what they may see as mistakes. They only want what's best for you but sometimes that concern and care gets in the way of your need/right to be in control.

Please note that, except in very exceptional circumstances, you are not allowed to use Direct Payments to employ a close member of your family. You can however employ family members using the Independent Living Fund, as long as you can clearly show that they are actually an employee and not just being slipped some money.



- Working with a Personal Assistant -

1.00pm	Introductions / Tea and Coffee	
1.10pm	Things that go wrong Working with other people Getting what you want	- Discussion
1.15pm	What problems have arisen What do people find difficult	- Discussion
1.30pm	What tips do people have What should you not do	- Discussion
1.40pm	Make a list	- Handout 1
1.50pm	Time Management	- Handout 2
2.00pm	Refreshments	
2.10pm	Being Assertive	- Handout 3
2.25pm	Being Critical	- Handout 4
2.35pm	Being Criticised	- Handout 5
2.45pm	Friendship	- Discussion
2.55pm	Sum up	

- Make a checklist -

Write down a list of everything that you need to tell your new personal assistant. This could include:

- what you like to be called.
- what medication you have to take and when.
- how you like your tea or coffee, any food that you don't eat.
- any religious or cultural rules that you follow.
- where your cleaning equipment/materials are.
- any parts of your home that are private to you.
- when you like to do things and how you want them done.
- how you like to be moved.
- how to use any equipment you may have.
- step-by-step 'how to' checklists that they can use as they go along.

"I like my tea fairly weak so don't leave the tea bag in too long"

"The iron is in its box in a 'cubby hole' to the left of the sink. I do **not** like creases down the front of my trousers"

"I like the kitchen cleaned every Tuesday, using Flash"

- Time Management -

It is important to make good use of you personal assistant's time, particularly if the number of hours of support you have is limited or they have a lot of tasks to complete.

- Think about how you will use you personal assistant's time.
- Make a task list or talk through with your personal assistant necessary tasks at the beginning of each shift.
- Prioritise tasks - identify those that must be done first.
- Give clear precise instructions so there is no confusion.
- Delegate - allow your personal assistant to make decisions about how and when some tasks should be done.
- Be realistic about how long a task will take.
- Make sure your personal assistant knows how you like particular tasks to be done.
- Give your personal assistant breaks during their shift when they can have time to themselves.
- Allow enough time for a personal assistant to clean up after themselves before their shift finishes - a personal assistant leaving dirty cups or a mess may upset the next one.
- If your personal assistant does not finish their shift on time because of additional work, be prepared to pay overtime.
- There may be times when your personal assistant doesn't have anything to do. Accept this and don't put yourself under stress by always trying to keep them occupied. Tell them not to feel guilty about it either - they are still working.
- Expect the unexpected!

- Being assertive -

Sometimes, even when a person knows what they want their personal assistant to do, they feel as if they do not have the right to ask for it or they don't know how to ask effectively.

Similarly, having the confidence to say "No" or turning down a personal assistant's suggestions can prove difficult.

Sound familiar?

- ✓ People try to ignore what you are saying
- ✓ People put you down with comments or through their behaviour
- ✓ You are avoiding raising a difficult issue with a personal assistant
- ✓ Your personal assistant is annoying you but you say nothing
- ✓ You want people to acknowledge that **you** have rights

Assertiveness is being able to ask for something when you want it and feeling able to say **NO** to another person.

Assertiveness means:

- ✓ trusting your judgment
- ✓ having valid opinions
- ✓ making a point effectively
- ✓ being listened to
- ✓ feeling able to make mistakes
- ✓ being confident
- ✓ having self-control
- ✓ being able to get on with those around you
- ✓ listening to and respecting other people's opinions

Assertiveness does not mean:

- X being aggressive
- X shouting
- X threatening people
- X being patronising
- X manipulating people
- X ignoring others
- X being passive

- How assertiveness works -

Tell your personal assistant:

- ✓ what you want done
- ✓ when you want it done
- ✓ how you want it done
- ✓ why you want it done that way

“If you are going to be late for work, phone me, because I need to know whether you are coming.”

“I like to be rolled on to my side first rather than hoisted straight up.”

You should :

- decide in advance what it is you want them to do
- if it helps, make a list. Write down how things should be done.
- put tasks in order, with the most important to be done first
- only give one instruction at a time
- be clear
- be precise and positive
- be realistic about what can be done and/or what you can achieve
- set a reasonable time scale or deadline
- if you're ignored, don't be put off - repeat yourself
- or try saying the same thing in another way
- stick to your decisions

You should not:

- ✘** lose your temper or shout
- ✘** take things personally
- ✘** apologise for making a demand
- ✘** feel you have to say 'please' and 'thank you' every time

- Being critical -

If you feel that your personal assistant has let you down in some way, bring the matter up with them as soon as possible. Don't sit and stew over it - the same problem(s) will keep happening and you'll just feel frustrated and resentful.

If you are going to be critical of your personal assistant:

- ◆ do it in private, not in front of your friends, family or other personal assistants.
- ◆ if you are angry, wait until you have calmed down a bit.
- ◆ think in advance about what you are going to say.
- ◆ make your criticism clearly.
- ◆ don't exaggerate, stay on the point and don't make a meal of it.
- ◆ avoid commenting on their personality and don't make any personal attacks.
- ◆ ask them why they think the problem happened - were they unwell, were you unclear with your instructions, do they have pressures from caring for a child or parent?
- ◆ think about what you want them to do or change in the future to avoid the problem(s) happening again.
- ◆ ask them if they can think of any possible solutions.
- ◆ keep criticism balanced and acknowledge/praise your personal assistant's good points.

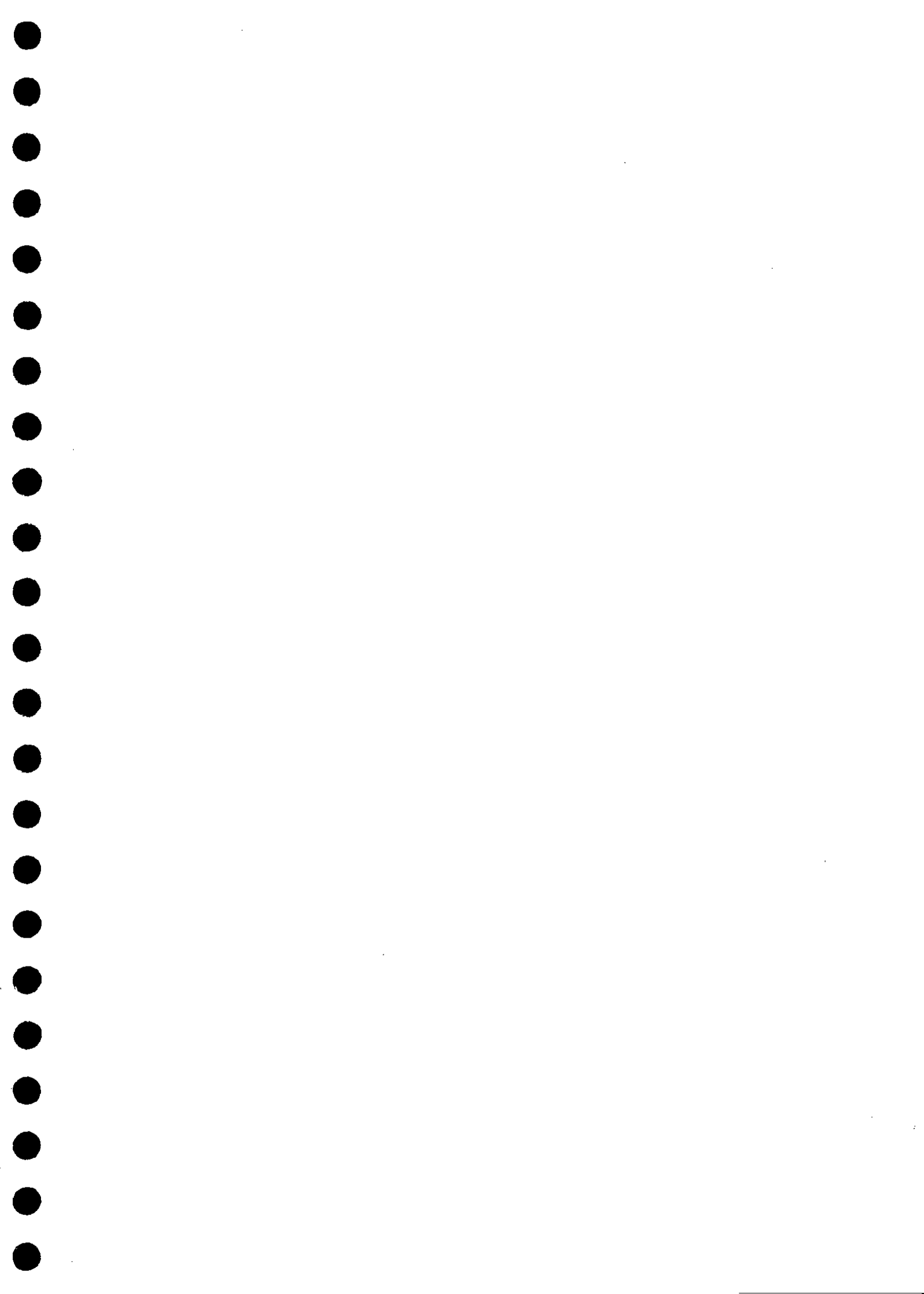
- Being criticised -

There may be times when your personal assistant feels that perhaps you are being unreasonable or that the work you've asked them to do can't be done in the time available.

It is best for both of you, if you make it clear right from the start that you welcome their input - suggestions and criticisms - although they must always understand that you are the person in charge.

To make it work:

- Accept that your personal assistant can be critical of you.
- Don't see criticism as a personal attack or challenge to your independence - you don't need to be defensive.
- Arrange a time to suit you when you will meet with your personal assistant to discuss what they have to say.
- Make it clear that they must not criticise you in front of other people.
- Similarly, don't criticise them in front of other people unless you have no choice because something has to be dealt with there and then.
- Listen to valid criticism and, if appropriate, agree changes that need to be made and the best way of making them.
- If criticism becomes personal, ask them to stick to the facts.
- If you are not clear about what they mean, ask for examples.
- If you disagree with their criticism, say so assertively, using clear "I" statements - "I prefer to be moved in this way", "I do it that way because ...", "I need it done at that time because...."



- Health and Safety -

1.00pm	Introductions / Tea and Coffee	
1.10pm	What do we mean by Health and Safety?	- Discussion
1.20pm	Why is it important <ul style="list-style-type: none">- you have responsibilities- minimise the risk of infections- legal issues- insurance issues	
1.30pm	What hazards are there in your home? <ul style="list-style-type: none">- Health and Safety- Moving and Handling- Food Hygiene	- handout of key things
1.50pm	Risk assessment? <ul style="list-style-type: none">- what is it?- who does it?	- handout
2.00pm	Refreshments	
2.10pm	How to do a risk assessment	- handout
2.30pm	Equipment	- handout
	Sources of Help	
	Training	
2.50pm	Summarise	

- Introduction to Health and Safety -

Health and Safety affects everyone. It is simply one part of the many things that happen in your home during the day. Reaching for something, boiling a kettle, cutting meat, using bleach, just moving around the house - all of these activities could cause an accident. Common sense usually avoids this.

When a personal assistant comes in to your house you both take on extra responsibilities.

- ☛ It is your responsibility to provide a healthy and safe work place for your personal assistant and not to do anything, or ask them to do anything, which may cause them injury.
- ☛ It is your personal assistant's duty not to do anything which might endanger either your or their safety at any time.

Follow our three point '**think safety**' plan :

- ❶ **What hazards are there in your home?** Read the section on 'Risk Assessment' to see how to go about identifying hazards in the home.
- ❷ **What is the risk** that any hazard will harm either you or your personal assistant? A hazard means anything that can cause harm. There shouldn't be that many serious hazards in your home and those that there are should be relatively simple to manage.
- ❸ **What do you need to do to manage any risk?** Tell your personal assistant how things should be done and what to watch out for. Always follow instructions. Read the section on 'Health and Safety Tips' for ideas.

Keep it simple and, if you are not confident about anything,
seek advice!

- Health and Safety tips for the home -

✦ Hand washing

Hand washing is one of the best ways to prevent the spread of illness or disease at home. Thorough hand washing with soap for at least 10 seconds using warm, running water, which lifts the organisms off the skin and allows them to be rinsed away, is effective in preventing disease transmission.

Personal assistants should wash their hands:

- * After contact with body fluids (e.g. blood, saliva, urine, mucous from the nose).
- * Before food preparation, handling, or serving.
- * After toileting.
- * After assisting you with toilet use.
- * Before handling food.
- * Before any activity connected with food (including setting the table).
- * Before and after eating meals or snacks.
- * After handling pets or other animals.

✦ Gloves

Disposable latex or vinyl gloves should always be used when your personal assistant may come into contact with blood, bodily fluids, or tissue or injury discharges and when creams or lotions are being applied. Don't use the thinner, polythene, gloves as they don't provide adequate protection. Gloves can be bought in bulk from Peacocks or Boots.

Utility (harder wearing Marigold style) gloves which are designated for cleaning should be used for sanitising and cleaning toilets. They should be used every time you clean and must **not** be used for any other cleaning purposes.

✦ Mops and cloths

Mops and cloths must be properly rinsed after every use in hot water to minimise bacterial growth.

✚ Cooking

Most fires start in the kitchen, especially fat fires. Always make sure your personal assistant keeps an eye on the pan when deep-fat frying and do not distract them with other tasks. Make sure that the pan is no more than one-third full of fat.

✚ Heating

You should have adequate heating in at least one room to keep you warm and cosy.

All heating systems should be regularly maintained. Gas boilers and fires should be checked once a year - if you are a tenant, your landlord must, by law, arrange an annual service. Never block up ventilation grilles.

If you are using an electric fire, make sure that the plugs are properly fused and that the flex to the plug is not loose or frayed.

✚ Electric appliances

House wiring should be checked by a qualified electrician around every 10 years. If an appliance appears faulty, have it checked at once.

Check that all your plugs are not cracked or damaged; that they have the right fuse for the equipment you are using; and that the flex to the plug is not loose or frayed.

Don't overload power points by plugging in too many appliances.

Never use portable mains-operated appliances, such as fires or lamps, in the bathroom. If you use electric blankets, keep them dry and flat.

If you or your personal assistant are handling equipment such as a vacuum cleaner, iron, lawnmower or drill, use a circuit breaker (Residual Current Device or RCD - available from DIY shops) between the appliance and the plug socket.

✚ Lighting

You should have enough lighting for you or your personal assistant to clearly be able to see what you are doing. Consider using lamps where you are reading or carrying out close work.

If a light bulb can't be reached without stretching, always use a step ladder - never ask a personal assistant to stand on a chair or table.

⚡ Pets

Some pets can transmit diseases to humans. Cats and dogs can be immunised and you should arrange for this to be done at intervals recommended by your vet. Ferrets, turtles and birds of the parrot family can transmit serious diseases and shouldn't be kept.

You should also, where appropriate, keep your pet on a flea, tick, and worm control programme.

Lastly, never keep a wild or dangerous animal in your home.

⚡ Slipping and tripping

Carpets and tiles with holes or worn patches and overly polished floors may cause people to trip or slip. Repair carpets/tiles where necessary and wash floors rather than polish. Never place a rug or mat on a polished floor.

Think about objects left on the floor and whether someone could trip over them. Don't leave electric or telephone wires trailing across the floor.

⚡ Household cleaners and chemicals

All household cleaning materials and chemicals are now marked on the label with a warning cross 6 and give you information about the chemicals and hazards they pose. Used sensibly, they shouldn't pose a problem to you.

Always keep materials in the containers they came in and don't leave protective caps off. Store them in a cupboard, away from direct heat. Only use the product for the purpose it is sold for.

Never mix cleaning products - when bleach is mixed with certain other cleaners it can give off a toxic gas!

⚡ Medications

All medications should be stored properly - away from food and at the proper temperature. If children come into your home, consider keeping your medications in child protective containers. Keep any leaflets that come with your medications and don't remove labels from the bottles. Medication should not be used beyond the date of expiration.

Never use someone else's medicine and don't give yours to anyone else. Unused medicine can be returned to a chemist for safe disposal.

⚡ Smoke alarm

If you haven't already got one, install at least one smoke alarm on each floor in your home. Get your personal assistant to check the battery at least once a month and replace it as soon as it starts to wear down.

⚡ Fumes and dust

You or your personal assistant may be allergic to fumes from air fresheners, furniture polishes and the like. It is safer to use alternatives - increasing the ventilation to freshen the air and furniture wax instead of polish.

Never mix cleaning or other products unless the product instructions specifically recommend it. Some products will give off noxious fumes when mixed together.

If you are affected by dust, make sure that surfaces are regularly dusted with a damp cloth. This should include the top edges of picture frames and windows.

⚡ Fire risks

Check whether you have any highly flammable materials in the house - paint and paint thinners, polishes, metholated spirits and turps are the most common. If you can, keep them outside in a shed or garage. If not, keep them in a closed cupboard away from direct heat or sunlight.

Make sure that your furniture has a kite mark label to show that it meets the current fire safety regulations.

Don't dry or air clothes near or on an open fire. If you have a coal fire, use a spark guard overnight.

⚡ Wheelchair batteries

Wheelchair batteries can give off fumes when they are being charged. The charging leads can also be a tripping hazard if you charge your battery in a hallway. If you can, charge your batteries in a garage or outhouse. If not, try and find a place with good ventilation away from the usual passage routes in your home.

Avoid charging batteries in a cupboard.

Check if your battery needs to be isolated before it is removed from the chair, to avoid the risk of electric shock.

- Lifting, Moving and Handling -

Many Disabled people require assistance with lifting, moving and handling - being turned during the night, being lifted in and out of bed, transferring from a seat to a wheelchair or from a wheelchair to a toilet, being pushed in a wheelchair and so on.

Where you use an individual to assist you with any of these tasks, this is known as manual handling. New regulations were introduced in 1992 (the Manual Handling Operations Regulations) to try and reduce the number of back injuries amongst nurses, care workers, personal assistants and so on caused by such manual handling.

Basically, the regulations say that :

- ❶ you must, as far as you practically can, try to avoid any manual handling operation which involves the risk of injury to your personal assistant.
- ❷ if you cannot avoid a manual handling operation you need to look at the possible risks to your personal assistant and look for ways of avoiding injury.

If you have ever had a nurse or a social services care worker someone has probably carried out what is known as a 'risk assessment' of your manual handling needs. This will have looked at:

- Ø the task - what manual handling do you need;
- Ø you - your impairment, your size and shape, any painful areas and, ideally, your preferences
- Ø the working area - how easy is it to manoeuvre in your house, is your bed in a convenient place, are there steps and so on
- Ø the worker - can they manage the task(s), will they need training

You should do something similar when you use a personal assistant for manual handling. Think about what tasks you need doing and how you want them to be done.

Then think about what you will need to make it happen :

- ◆ can your personal assistant always move or transfer you safely.
- ◆ have they been trained in safe handling techniques.
- ◆ will you need to move or re-organise furniture to make moving easier.

Handout / Lifting, Moving and Handling

- ◆ will you sometimes need two workers.
- ◆ does your personal assistant need to wear clothing which allows them to have a full and unrestricted range of movement.
- ◆ is there equipment which could provide assistance - sliding sheets, transfer board, turning disc, hoist or sling, monkey pole and so on.
- ◆ does the task always have to be done.

Personal assistants should not generally lift or move someone totally unaided. Whenever possible, they are required by Health and Safety law to use equipment in order to avoid the need for manual lifting.

However, this does not mean that equipment has to be used all of the time. There may be times when you are out and need assistance on and off a toilet and no equipment, or perhaps space, is available.

- ◇ Be sensible.
- ◇ Don't take unnecessary risks.
- ◇ Don't ask too much of your personal assistant.
- ◇ If necessary, allow them a rest period before moving on to another task.
- ◇ Encourage them to tell you if they think they can't manage something or that it could be better done differently.

If you want further advice on lifting, moving and handling, ask your GP to arrange a visit from a health visitor or District nurse.

- Cool it, Clean it and Cook it -

You can protect yourself from food poisoning with sensible food storage and cooking habits.

Cool it

Harmful bacteria can multiply rapidly in temperatures of 5°C to 63°C - the danger zone!

- ∅ keep food cold - in a refrigerator or on ice. Never leave it standing in a room or in sunlight.
- ∅ defrost frozen food in the refrigerator, not at room temperature.
- ∅ use raw food (cook it or freeze it) within 1 to 2 days.
- ∅ be extra careful if you are adding a hot sauce to cold food.

Clean it

Bacteria can be killed by good, simple hygiene. Wash hands, utensils, counters, cutting boards, sponges, dish towels, aprons, and sinks in hot soapy water, particularly after handling any raw meat.

Cook it

Use proper cooking techniques. High heat kills harmful bacteria. Cook food thoroughly, at high temperature. Leave no pink bits! If you are re-heating anything, make sure it is thoroughly warmed through.

Watch it

There are high risk foods which you need to be extra careful of:

- * slices of cooked meat and cooked poultry
- * meat or fish pates and spreads
- * milk and eggs, and uncooked and lightly-cooked dishes made with them
- * shellfish and seafood, including prawns, shrimps, mussels, oysters, crab, lobster and scampi.
- * cooked rice.

Throw it

If you have spoilt food or food beyond its sell-by date, throw it away immediately. Not only is it bad for you, it will often quickly affect other food it is in contact with.

Typical signs of spoilt food include:

- * discolouration, including dark or pale patches.
- * visible mould.
- * changes to the usual smell, often unpleasant.
- * changes in texture, including wrinkling and drying, softening and becoming pulpy.
- * an alteration of the usual flavour, including sourness.

- A risk assessment in your home -

Use this checklist (✓ or ✗) to identify any potential hazards in your home. Then read the section on 'Health and Safety Tips' to get some ideas of what steps you can take to reduce the risk of harm or injury.

Fire Safety

- ☐ do I have smoke alarms on each floor of my home
- ☐ have I checked the smoke alarm batteries in the last year
- ☐ do I ever leave a pan unattended when cooking with fat
- ☐ are flammable materials kept in a safe place
- ☐ do I ever smoke in bed
- ☐ do I use deep ashtrays for stubbing out cigarettes
- ☐ does my furniture meet fire safety regulations

Electrical Safety

- ☐ do I have too many plugs in any of my sockets
- ☐ are any plugs cracked, damaged or showing signs of burning
- ☐ are any flexes worn or loose
- ☐ could any flexes be trapped, say to an adjustable bed or chair
- ☐ am I concerned about any of my electrical appliances
- ☐ do my plugs have the correct fuses in them
- ☐ do I have a circuit breaker (Residual Current Device or RCD)
- ☐ do I use any portable mains-operated appliances, such as fires or lamps, in the bathroom
- ☐ has my electric wiring been checked in the last 10 years
- ☐ do I know who to call in an electrical emergency

Heating safety

- ☐ do I dry or air clothes over or near fires or by the cooker
- ☐ do I have a spark guard for my open fires

Handout / A risk assessment in your home

Gas Safety

- ☐ has my gas boiler and/or heaters been serviced in the last year
- ☐ are the boiler and/or fires adequately ventilated
- ☐ are the pilot lights on
- ☐ do I know who to call in a gas emergency

Medicines

- ☐ do I need a medicine cabinet
- ☐ do I have a first aid kit
- ☐ are all medicines clearly labelled and in their original containers
- ☐ are any medicines past their use by date
- ☐ do I know how to dispose of medicines

Cleaners and chemicals

- ☐ are household cleaners and chemicals in their original containers
- ☐ do I only use normal household cleaners and chemicals
- ☐ are cleaners and chemicals stored safely
- ☐ do I (or my personal assistant) always wash my hands after using cleaning materials and/or chemicals
- ☐ do I ever mix cleaners

Wheelchair batteries

- ☐ do I have a ventilated space to charge my wheelchair batteries
- ☐ is the battery charging equipment kept out of the way

Tripping and Slipping

- ☐ are there any trailing wires or flexes
- ☐ have I left anything in the way
- ☐ are the carpets worn, frayed or wrinkled
- ☐ have I waxed any floors
- ☐ do any tiles need replacing
- ☐ are the rugs secure

Handout / A risk assessment in your home

Cleaning equipment

- ☐ do I have disposable gloves for use with personal care tasks
- ☐ do I have stronger 'marigold' gloves for use when cleaning
- ☐ are mops and cloths cleaned after every use

Lighting

- ☐ are my stairs and passage ways well lit
- ☐ do I have enough light to read and cook by

Reaching

- ☐ do I have a footstep or stepladders to avoid overreaching
- ☐ are heavy and regularly used items stored lower down

Pets

- ☐ have my pets been immunised
- ☐ are my pets treated for fleas, ticks and worms
- ☐ are my pets safe with 'strangers'

This is by no means a complete list. Add any other things in your home that should be regularly checked.

- ☐
- ☐
- ☐
- ☐
- ☐
- ☐
- ☐
- ☐

- Health and Safety Equipment -

If you need **daily living equipment** or aids - a hoist, shower chair, dressing equipment, a height adjustable bed and so on - in your home, you should contact your nearest Social Services office or your current social worker.

They will then refer you to an Occupational Therapist who will come to your home to do an assessment and give you advice. The main office for adult Disabled people to contact is at:

Prince Consort Road,
Gateshead,
NE8 4HJ.
Tel: 490 1616 (voice) 478 5981 (minicom).

If you need **home nursing equipment** - commodes, pressure relief cushions and mattresses, continence supplies and so on - contact your family doctor (GP), local health visitor or district nurse.

If you need equipment or aids **at work**, you should contact the Disability Service Team at:

Shildon House,
High Street,
Gateshead,
NE8 1AS
Tel: 451 4234 (voice)
to arrange an assessment.

If you want to buy equipment locally, try :

Acorn Medical who have a shop in the Mediterranean Village at the Metro Centre. Tel: 460 2743 (voice). They supply a full range of home care products, including disposable latex gloves, and can order equipment or other products you might need.

Peacocks (Surgical and Medical Equipment Ltd) who have a shop at Friar House, Clavering Place, Newcastle upon Tyne, NE1 4LQ. Tel: 232 9917 (voice). They supply a full range of home care products, including gloves, glide sheets, slings, hoists and so on.

- Training -

It is probably too expensive to set up your own professional training for your personal assistants. Far better to find an existing course or agency which runs courses you can slot someone in to.

Speak to GPAP in the first instance if you want to train a personal assistant. We should be able to point you in the right direction.

St John Ambulance organise training courses in 'First Aid' and 'Moving and Handling' which individuals can attend. They can be contacted at:

Northumbria Training Services,
St John House,
Westgate Road,
Newcastle upon Tyne
or by phone on 273 7938 (voice).

The **Royal Victoria Infirmary's Therapy Services Department** have a Manual Handling Service which organises training courses, including short sessions which are reasonably priced (currently £30), in Moving and Handling. They can be contacted at the

Royal Victoria Infirmary,
Queen Victoria Road,
Newcastle upon Tyne,
NE1 4LP
or by phone on 232 5131 (voice) or 227 5248 (fax).

Voluntary organisations such as Age Concern Newcastle and Leonard Cheshire run 'Health and Safety' courses for their own staff and can sometimes include personal assistants on their internal courses.

There are **private companies** (eg. Cascade Training and Consultancy, Mobile Care Qualifications) who provide training on health and safety skills and/or give advice. However, this would be more expensive than using a voluntary organisation. GPAP can give you information on the companies running courses locally.

GPAP may also be able to organise a course if a number of Disabled people are interested in training their personal assistants. We can provide a venue and organise the trainers, and the costs can be shared with other Personal Assistance users.

- Sources of Help / Information -

The **Council on Disability's** Information Library contains information about Health and Safety Issues and about aids and equipment. You can make an appointment to use the library by contacting the Information Services Coordinator, Siobhan O'Neil.

The **Health and Safety Executive Infoline** on 0541 545 500 (voice) provides advice to individuals and employers about health and safety and can advise you on the law. You can also write to:

Health and Safety Executive's Information Centre,
Broad Lane,
Sheffield, S3 7HQ.

The **National Back Pain Association** produce a 'Guide to the Handling of Patients' which provides advice on lifting, moving and handling issues. This is the book that local authorities and health services refer to. GPAP has a copy in its library at John Haswell House which you are welcome to refer to.

The **Gateshead Council's Health and Consumer Services Department** can advise you about health and safety issues and on relevant legislation. This could include hazards in your home, the safe use of cleaning materials, information about pests and so on. You can contact them at:

Health and Consumer Services Department
Civic Centre,
Gateshead, NE8 1HH

or by telephoning 477 1011 (voice), 477 4827 (fax).

You should ask for 'Consumer Advice' (extensions 3987, 3890 & 3930).

The **Chartered Institute of Environmental Health** can provide details of accredited courses in Health and Safety and in Food Hygiene. They also produce 2 handbooks which look at the first principles of 'Food Safety' and of 'Health and Safety'. The Institute can be contacted at:

CIEH,
Chadwick Court,
15 Hatfields,
London, SE1 8DJ.

Tel: 0171 928 6006 (voice), 0171 827 5865 (fax).

The **Institute for Safety and Health Practitioners (IOSH)** provides links from its web site to all the major sources of Health and Safety information around the world. Visit the site on www.iosh.co.uk/inform/links.html

Handout / Sources of help and information

If you want advice on lifting, moving and handling, speak to your family doctor (GP), local health visitor or district nurse who can arrange for an Occupational Therapist from **Gateshead Health NHS Trust** to visit you.

The **Disabled Living Foundation (DLF)** can provide telephone advice on using and buying the right equipment, large and small. Ring the DLF telephone Helpline on 0870 603 9177 (voice), 0870 603 9176 (minicom). Please note that you will be charged 8p per minute for your call.

You can also use the Council on Disability's computers to visit the DLF's web site and look at their information on equipment.

Disability North at the Dene Centre, Castles Farm Road, Newcastle Upon Tyne (near the Freeman Hospital), has a range of equipment, such as hoists and bathroom equipment, which you can try out. You can arrange an appointment to visit the Centre by phoning 284 0480 (voice) between 10am and 4pm and asking for the Duty Officer in the Disabled Living Centre.

If you have bought or are buying equipment and you find problems with the supplier or the equipment, you can get advice from **Gateshead Council's Health and Consumer Services Department**.



- Independent Living Fund -

1.00pm	Introductions / Tea and Coffee	
1.10pm	About the funds - the 2 schemes?	- Discussion
1.20pm	The History - why was it introduced? - why did it change in 1993?	
1.35pm	About the ILF - its funding - who runs it - who does the assessments	
1.45pm	The criteria for getting a grant	
2.00pm	Refreshments	
2.10pm	The Application process - Social Services role - your role - the ILF assessor	
2.30pm	Using your ILF	
2.45pm	Tricks and Tips	
2.50pm	Summarise - Sources of Help	Handout

- The Independent Living (93) Fund -

What is the Independent Living Fund?

The Independent Living (1993) Fund (often called the ILF 93) is an independent charitable trust which receives an annual grant from the government to provide funding to Disabled people.

- It supports long-term independent living for Disabled people by helping them to live at home rather than in residential care.
- It gives Disabled people a cash payment every four weeks to pay for personal assistants or to buy the services of a domiciliary care agency.
- Payments are made directly to a Disabled person's bank account.
- You have to first have the support of the social services department in order to apply to the ILF 93.
- You must be getting the cash equivalent of at least £200 of community care services from social services to be considered.
- The cash you get from the ILF 93 is in addition to any services or direct payments you may get from social services.
- The Secretary of State for Social Security appoints seven people, who are called trustees, to manage the ILFs' funds and review their policies. They are not paid for their time.
- The ILF 93 has an office in Nottingham.
- The ILF 93 employs its own social workers who make recommendations, in discussion with you and your social worker, about how much cash you should receive.
- There is no minimum amount that you can receive from the fund. There is a current maximum of £300 of additional funding from the ILF 93.

A brief history

- ➔ The first Independent Living Fund was established in 1988.
- ➔ It was set up after pressure from the Disabled People's Movement, when changes to the benefit system meant some Disabled people were about to lose some benefits they used to fund their assistance.
- ➔ Also, it was clear Disabled people who used live-in volunteers, who were only paid pocket-money, needed the funding, choice and flexibility to be able to pay proper wages.
- ➔ The first ILF had a budget of £5 million a year to help 400 to 500 people.
- ➔ There were no age restrictions.
- ➔ By the end of 1992, the ILF was spending £97 million on about 18,000 people!
- ➔ Ten people in Gateshead still get funding from this original fund.
- ➔ Government concerns about these costs led to rule changes in April 1993. Those already receiving payments were transferred to something called the Independent Living (Extension) Fund.
- ➔ The new Independent Living (1993) Fund was established for anyone applying after 31st March 1993.
- ➔ New applicants have to be receiving at least £200 of services a week from their local social services department.
- ➔ This "£200 rule" has stopped many people being able to apply to the ILF 93 because their local authority might only allow a small number of Disabled people to receive this level of services.
- ➔ The Direct Payments Act introduced in 1996 was a response to the demands of Disabled people and local authorities for a more flexible system, and to allow those people with smaller 'care' packages to employ their own personal assistants.

To first apply to the ILF 93 you must :

- ✓ be at least 16 and under 66 years of age
- ✓ be a Disabled person and receive the highest rate of the care component of Disability Living Allowance
- ✓ be at risk of entering residential care (or currently be there and wish to live independently)
- ✓ live alone or with people who cannot meet your assistance needs
- ✓ be on Income Support or have an income (from wages, interest on savings and so on) above Income Support level but which is less than the cost of the assistance needed
- ✓ have savings of less than £8,000
- ✓ be capable of living in the community for at least six months
- ✓ receive at least £200 worth of services from your local authority each week.

You will not normally be eligible for the ILF 93 if:

- You live in
- a residential or nursing home
 - a hospital
 - a children's home
 - a residential school or college (although funding can be provided during holidays)
 - a property as a licensee rather than with your own separate tenancy agreement

You are discharged from a hospital or residential care on a trial basis.

You are leaving a long-stay hospital because it is closing.

Some common questions

What if I receive Constant Attendance Allowance rather than Disability Living Allowance?

Some people who receive Industrial Injuries Disablement Benefit or War Disablement Benefit receive Constant Attendance Allowance (CAA), not Disability Living Allowance. The ILF 93 will consider an application from someone receiving CAA but each application is considered on its merits.

What if I do not live alone ?

Applications will be considered from people who live with their partner, relatives or friends if they are unable to provide you with the full assistance you need.

If two or more applicants to the ILF 93 live in the same household, the local authority must provide services worth at least £200 a week to each individual concerned. The cost of any shared assistance will be split equally, but each application will be considered separately.

What happens when I reach my 66th birthday ?

As long as the other qualifying conditions are still met, the ILF 93 will continue to provide financial help.

I do not currently get £200 of services from social services. Is there anything I can do?

If you have never been assessed by social services or your 'care' package has not been reviewed recently and your needs have changed, you can ask for a new assessment of your needs.

Don't forget that services include home care, respite care, day centres, luncheon clubs, meals on wheels and so on.

What if I am currently living in a residential home?

You can apply on the basis that the funding will start as soon as you find somewhere to live independently. Your social worker will work with you to cost a 'care' package on that basis.

How do I apply?

The starting point

Either you or your social worker contacts the ILF 93 and asks for an application form. See page 12 for the address and phone number.

The application form

The application form asks for some personal details from you and information from social services to see whether you pass the initial eligibility test.

A social services representative will have to sign the application form to confirm that they will be providing you with at least £200 of services a week and give a general idea of what these services are. The £200 minimum has to be **after** you have paid any charges that social services make for providing you with home care, etc. If you pay £20 in charges you will need to receive £220 of services.

These services can include home care, day centre care, respite care and meals on wheels.

The following services do not count when applying to the ILF 93:

- ✗ alarm call systems
- ✗ the cost of buying or maintaining equipment
- ✗ salaries of a social worker, care manager and so on
- ✗ any service provided by the NHS
- ✗ child care
- ✗ services funded by other council departments

If your application seems to meet all the qualifying conditions, the ILF 93 will then write to the local authority to arrange a meeting.

Who will be involved?

The application process will involve three or four people - you (the applicant), your local authority representative (usually your social worker), an independent Visiting Social Worker from the ILF 93, and, if you wish, a friend, relative or advocate.

What does everyone do?

You, the **applicant**, will:

- ◆ prepare for the assessment meeting.
- ◆ answer questions and explain to the Visiting Social Worker why you need assistance, and the type and level you require.

Your **Local Authority Representative** will:

- ◆ prepare thoroughly with you before any assessment so that you both know the level of assistance you are asking the ILF 93 to fund.
- ◆ attend a joint assessment meeting with you and the Visiting Social Worker.
- ◆ confirm to the Visiting Social Worker that you are receiving at least £200 of community care services.
- ◆ provide a breakdown of these services and their cost.
- ◆ liaise with the Visiting Social Worker before and after the meeting.
- ◆ help you to pursue any grievances with the ILF 93's final decision.

The **Visiting Social Worker** will:

- ◆ listen, ask questions and gather information so that they can compile a detailed report and make a recommendation to the ILF 93.
- ◆ explore alternative means of meeting your assistance needs.

Your **friend, relative or advocate** will:

- ◆ provide you with support and assistance and, if appropriate, any additional information that may be relevant.

What happens at the assessment meeting?

At this meeting, the Visiting Social Worker will make an assessment of your needs and compile a detailed report. This will include:

- an assessment of your finances
- information about your 'abilities'
- the services and assistance you receive from social services and other sources
- a recommendation to the ILF 93 on how much assistance you should receive

How should I prepare for my ILF assessment?

- ☐ Doing a **self-assessment** of your own needs will allow you to be clear about what support you believe you need. You can use GPAP's publication 'What do I want to do' to help you.
- ☐ Construct your own **ideal 'care' package** that will meet those needs identified in your self-assessment document.
- ☐ **Seek advice** from GPAP about the ILF 93's approach to assessment and their possible response to your requests.
- ☐ **Avoid confusion** and agree with your social worker before the Visiting Social Workers's visit what you will ask the ILF 93 to fund and why.
- ☐ **Access** - if you need a communicator, an interpreter, a lip reader or communication equipment to put forward your own views, ask social services in advance to provide this.
- ☐ If it will help, arrange to have a friend, relative or advocate there to **support** you at your assessment.
- ☐ **Speak to other people** who have had an assessment. They can give you an idea about what happens and any arguments they have successfully used.
- ☐ Although an assessment can be stressful, try to **relax** before it so that you can think as clearly as possible during the assessment.

How should I behave during the assessment?

The Visiting Social Worker is not out to trick you or prevent you from getting funding. They are genuinely interested in what you want and need, and in providing the relevant support.

Be friendly but assertive about the 'care' package that you think best meets your needs.

What if I am unhappy with the Visiting Social Worker's recommendation?

There is no formal appeals process, but an applicant (or their social worker) can ask for a decision to be reviewed by someone at a more senior level within the ILF 93.

Some cases are referred to the ILFs trustees when they are complex or challenge the lack of fairness of some of the ILF's rules. For example, until recently the ILF 93 treated any child maintenance received by a single parent as being available to be spent on the parent's assistance costs.

What does the financial assessment involve?

The ILF 93 believe that all applicants should contribute financially to the final 'care' package they agree with you and the local authority.

Therefore, you are expected to contribute:

- ££** half of the care component of your Disability Living Allowance
- ££** all of your Severe Disability Premium
- ££** all of your Special Transitional Allowance
- ££** any income above Income Support level

If a person is working in paid employment, the ILF 93 allows you to keep :

- : an allowance equivalent to Income Support plus £30
- : an amount to pay your rent or mortgage
- : an amount to pay council tax and water rates
- : an amount to pay child maintenance

You are expected to put any remaining income towards paying for your 'care' costs. This can act as a disincentive to seeking paid work.

What if I am married or cohabiting with someone ?

Their income and/or earnings, capital and savings will be taken into account in any financial assessment the ILF 93 carry out.

What is included as savings ?

Bank balances, stocks and shares and compensation awards. If you are seeking compensation from, say, an employer or Health Trust, you can receive money from the ILF 93 up until the point you are actually made a compensation award. You will then be financially re-assessed and the award will be taken into account. You will not, however, be expected to repay any ILF monies already paid before you received your compensation.

What if I benefit from a trust fund ?

The ILF 93 will obtain a copy of the Trust Deed and determine how much can be taken into account in any financial assessment.

What if I am a student ?

The ILF 93 will only disregard £10 of a student's income above Income Support levels, and they assume someone will have income from a student loan if it is available.

Using your Independent Living Fund

How much will I get ?

This will depend on the Visiting Social Worker's final recommendation and the ILF 93's financial assessment of your income.

When first applying, the ILF 93 will only provide funding up to £500 a week. For example, if social services provide £300 of services a week, the ILF 93 will only fund an additional £200.

After someone has been receiving ILF payments for a few months, they can apply for an increase in their funding if their circumstances change or they find their personal assistance costs have gone up.

Handout / The Independent Living (93) Fund

What can I spend ILF 93 money on ?

- ✓ Personal Care such as dressing, eating, washing and bathing, getting in and out of bed, and moving around the home.
- ✓ Personal Care needed during the night.
- ✓ Personal Care needed when attending college or university, going out or at work.
- ✓ Being accompanied on holiday.
- ✓ Domestic assistance such as cleaning and tidying, cooking and preparing meals, washing up, laundering, ironing and shopping.

What can I not spend it on ?

- | | |
|---|------------------------|
| ✗ Social activities | ✗ Transport / mobility |
| ✗ Gardening | ✗ House maintenance |
| ✗ Equipment | ✗ Nursing care |
| ✗ Counselling | |
| ✗ Assistance with educational work such as taking notes, typing up essays and so on. | |
| ✗ Assistance with work tasks such as photocopying, filing and so on. | |
| ✗ Assisting other members of your household (except any children that you are responsible for). | |

Is there much paperwork involved ?

Not really. You need to provide the ILF 93 with information once a year. This includes general details of what you spent the money on, which home care agencies (if any) you used and the National Insurance numbers of any staff you employed directly yourself.

You also need to keep them informed of changes to your circumstances, stays in hospital and so on.

Handout / The Independent Living (93) Fund

Can I employ a relative?

The ILF 93 will consider a request for you to employ a close relative (such as a parent, aunt, uncle, son, daughter, brother, sister, in-laws and so on) if they do not live with you and maintain their own home elsewhere. They are allowed to sleep-over when they are providing assistance during the night.

If I go into hospital, will my funding stop ?

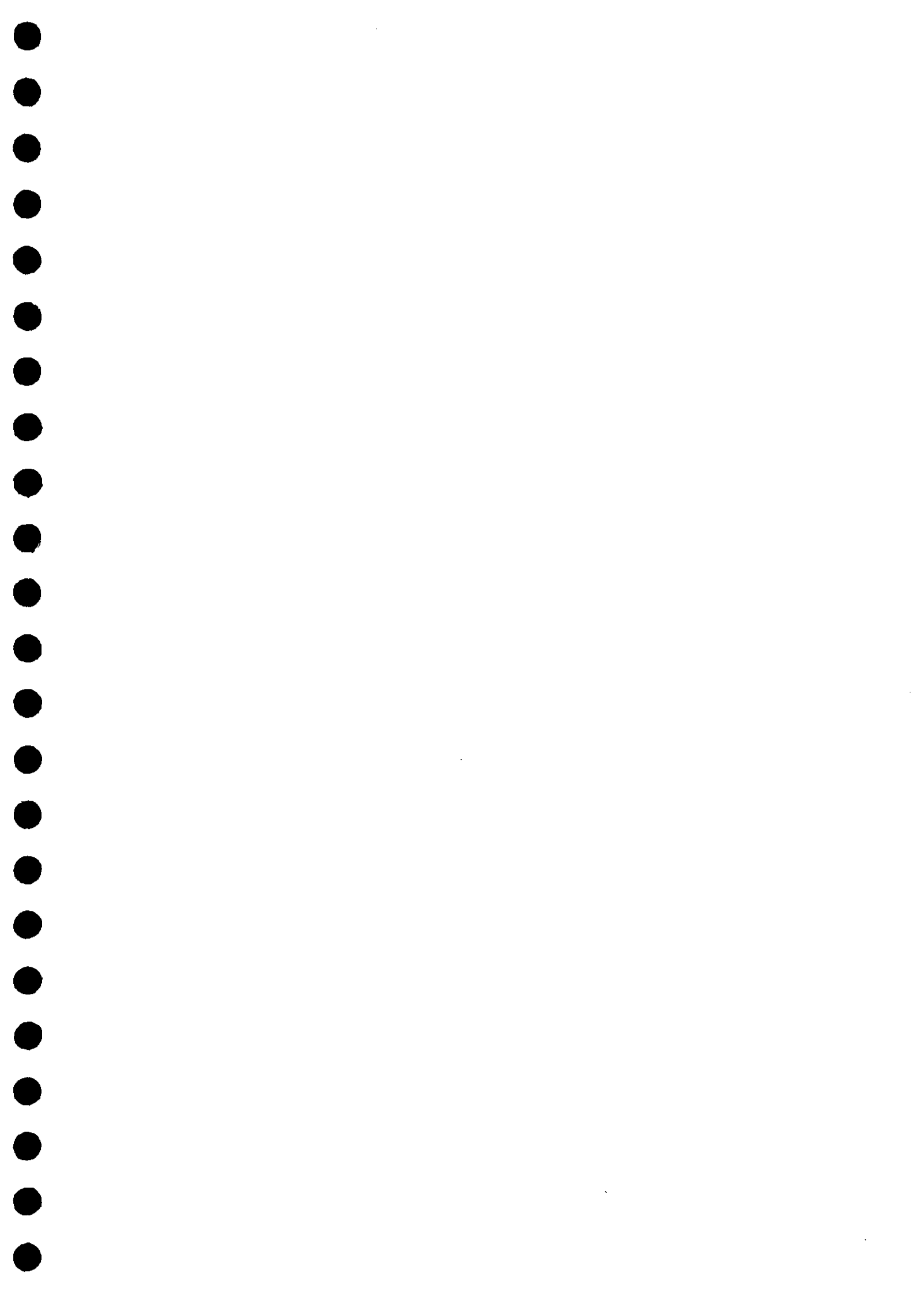
If you go into hospital on a planned visit you should notify the ILF 93 straight away. Your funding will normally stop the next day.

If you are taken into hospital in an emergency or unplanned basis, your ILF funding will normally continue for seven days before you have to inform them.

In both cases, the ILF will provide you with continued funding for up to a further four weeks so that you can pay a retainer to keep the services of your personal assistant. This is currently two-thirds of the hourly pay rate.

Other Tips

- ① establish an ILF bank account separate to your personal finances.
- ① talk to other ILF recipients or GPAP if you have difficulties.
- ① you can phone the ILF for advice.
- ① if your needs change, you can get more funding from the ILF 93. Ask your social worker how to proceed.
- ① if you don't spend all of your ILF funding one month, don't worry. It can be spent the next.
- ① the ILF checks your expenditure once a year. Make sure you don't have a significant surplus. Think about a holiday!



- Direct Payments -

1.00pm	Introductions / Tea and Coffee	
1.10pm	What are Direct Payments?	- Discussion
1.20pm	The History	
	- trusts	
	- 3rd party schemes	
	- brokerage	
	leading to Direct Payments Act	
1.40pm	BSL video	
2.00pm	Refreshments	
2.10pm	The Government regulations	- Handout
	- client groups (now and proposed)	
	- carers role	
2.20pm	Gateshead scheme	- Terri
2.40pm	Users experience	- Carole +
2.50pm	Worries?	
2.55pm	Summarise	

- Direct Payments -

What are they?

Traditionally, when social services has assessed someone as needing community care support, they will arrange for support services to be directly provided to them. This could include home care staff, meals on wheels, shopping service, time spent at a day centre and so on.

Direct Payments means that instead of arranging the services for someone, the social services department can give a Disabled person the cash equivalent of what the services would cost. The Disabled person then uses the money to purchase their own services.

The Community Care (Direct Payments) Act which allowed this to happen was passed in July 1996, coming into effect in April 1997. A small number of Gateshead residents have been receiving Direct Payments since April 1999.

Who can get direct payments?

To be eligible for direct payments someone must be:

- ▶ a Disabled person. This includes people with physical and sensory impairments, people with learning difficulties, people with enduring mental health problems and people with HIV/AIDS
- ▶ assessed by social services as needing services that the department provides
- ▶ willing to have a direct payment
- ▶ able to manage the payment, either alone or with assistance, and make decisions about how the money is spent
- ▶ currently, over 18 and under 65 when the scheme starts. The law is soon to be changed to remove the upper age limit.

It is important to know that the law only **allows** social services departments to make Direct Payments if they want to - it does **not require** them to set up a scheme. Gateshead have, however, chosen to set up a scheme locally.

The Gateshead Scheme

Gateshead Council has set up a pilot '**Personal Assistance Support Scheme**' (PASS) to look at how the social services department can fully introduce direct payments.

The Gateshead Pilot scheme is currently only open to residents of Gateshead who are physically Disabled with a substantial and stable disability. There is no upper or lower limit on the number of hours of care that a person has to be receiving.

Participants have to be assessed, selected and approved by the social services department and preference is being given to people "who are likely to most effectively and successfully use the scheme".

The Leonard Cheshire Foundation have been given a contract to run the pilot scheme for the first two years. They have employed a part-time co-ordinator to assist (as far as is required) the Disabled people taking part in the scheme.

The Pilot Scheme has proved so successful that it has already been extended and is likely to become a permanent feature of community care provision in Gateshead.

Why would someone want direct payments?

Direct payments are intended to support independent living and personal assistance. If someone receives direct payments, they can decide how their needs will be met, by whom and at what time. They are in control.

How much do people get?

There is no upper or lower limit but Gateshead will usually not pay more than the cost of residential care. People should get enough money to pay for the services that they have been assessed as needing. They should also get the money to pay for any legal responsibilities they will have as an employer.

As of April 1999, social services are providing an hourly rate of £5.40 which has to cover wages, employer and employee tax and national insurances, holiday and sick pay and so on. There is an additional lump sum payment of £350 to cover things like start-up costs, training, emergencies and administration costs.

What can direct payments be spent on?

The money must be spent to arrange services to meet community care needs. It is not simply extra money to spend as someone chooses. If they wish, and social services agrees, it may be possible to arrange a combination of direct payments and services such as a home help or attending a day centre.

You can pay for short stays in residential accommodation, say to give you a break from a carer, but direct payments cannot be used to pay for more permanent stays.

Who can be employed as a personal assistant?

Basically, it is up to the Disabled person to choose. They can employ someone directly or, if they prefer, they can use an agency to provide staff for them.

However people cannot, without the prior agreement of social services, employ :

- ▶ a spouse or partner
- ▶ a close relative
- ▶ anyone living in their household (except a live-in employee)



- Home Care Staff Training -

This is very different from the other two courses in this training pack, in that it is aimed at the social services staff who provide home care for Disabled people, not Disabled people themselves.

We should emphasise from the start that it is not training in how to be a personal assistant. It is our view that personal assistant training is best carried out by the personal assistance users. Our training is aimed at providing staff with an introduction to personal assistance, challenging some of the assumptions that staff make about their 'clients' and encouraging them to understand the importance of choice and control to Disabled people.

The training arose out of work carried out by the Personal Assistance Information Network (PAIN). This is a group of Disabled people who meet monthly to discuss issues around personal assistance. Some employ their own staff, some are building up to it, however, most have used home care or nursing staff at some time in their lives.

PAIN was asked by the social services department to help develop a new users guide to home care. This proved so successful that the group went on to contribute to the production of a new home care staff handbook. It was at this point that PAIN members pointed out that one of the main problems they faced was the attitude of staff. They felt that this should be tackled as part of the staff training and induction.

To their credit, social services responded by offering PAIN a spot in their training programme for newly employed home care staff. The training was extended from 5 up to 6 mornings and we share the morning with the Gateshead Access Panel who start with a session on Disability Equality Training.

The training itself was designed by PAIN members and it is mainly delivered by them. It has had mixed reactions from the staff themselves. Some welcome and understand it, questioning some of the structural and management issues that force them to provide a service in certain ways. Others, particularly those who see themselves in a very caring and helping role, are offended and feel that they are being attacked. Either way, it usually elicits a strong response.



- 11.25 Introductions - who we are, what we do, what we are doing here
We talk about personal assistants not carers - distinction will become clear later.
- 11.30 Split them into pairs and give them the the following question : **(Exercise 1)**
If you were to ask a Disabled user of the home care service
“what are the good things things and what are the bad things
about the service” what do you think they’d say?
They have 5 minutes to come up with 5 of each.
- 11.35 Feedback - what did they come up with? **(Flip chart)**
- 11.45 We asked some users the same question. This is what they said. **(Handout 1)**
Discussion : are they fair points?
- 11.55 Why do these problems happen? **(Discussion)**
- 12.05 About to show a video. Anyone know about Direct Payments?
- 12.10 NCIL video- ‘Using a personal assistant’ **(Video)**
- 12.25 So what is Personal Assistance? How does it differ from Care? **(Handout 2)**
- 12.30 Split them into pairs and give them the following question : **(Exercise 2)**
“If you had to use home care what qualities would you want
in your ideal home care worker?”
They have 10 minutes to come up with 10 qualities.
- 12.40 Feedback **(Flip chart)**
- 12.45 This is what we would like to see happen **(Handout 3)**
- 12.55 Close - any questions?

- Exercise 1 -

If you were to ask a Disabled user of the home care service
“What are the good things and what are the
bad things about the home care service”
what do you think they would say?

Five good things

Five bad things

- Handout 1 -

What we like

- 1) Let's me live at home.
- 2) I couldn't do without it.
- 3) Provides an essential service.
- 4) Keeps the house clean(ish).
- 5) Workers are good time-keepers.

What we don't like

- 1) People always making decisions for me.
- 2) Inflexible - always do the same thing on the same day.
- 3) Never ask me what I want.
- 4) Poor grasp of hygiene.
- 5) Telling me things about other people.
- 6) Talking about me to other people.
- 7) Can sometimes be unhelpful - it's not my job.
- 8) Refusing to change light bulbs or curtains - say it's unsafe.
- 9) No one seems to check the work.
- 10) My appearance or comfort not seen as important.
- 11) Leave things in cupboards out of my reach.
- 12) Use me as a babysitter.
- 13) Flitting between me and the person next door.
- 14) Turning up at the same time as the nurse - having breakfast in the shower.
- 15) The bad atmosphere between some home care and nursing staff.
- 16) Some staff seem to think they are doing me a favour.
- 17) They forget it's my home.

- Care v Personal Assistance -

- ▶ **Care** is about having services provided and delivered in a way which suits the carer.
- ▶ **Personal Assistance** is about Disabled people controlling their own resources and support staff. Staff are known as personal assistants.
 - ▷ In the **Care** approach, the carer decides what work tasks need done and when they will do them.
 - ▷ In the **Personal Assistance** approach, the Disabled person gives instructions to their personal assistant.
- ▶ In a **Care** situation, the carer is responsible for protecting their own health and safety.
- ▶ In the **Personal Assistance** situation, a personal assistant works under the direction of the Disabled person to ensure that health and safety issues are considered and that effective risk assessments are made.

You are given care.

You control personal assistance

- Exercise 2 -

If you had to use home care, what qualities would you want in your ideal home care worker?

List 10 qualities

- Handout 3 -

What we want

- **“What would you like me to do today?” - ask me what I want done, when I want it done and how I want it done;**
- **be flexible about what’s done and when its done;**
- **be prepared sometimes to drop some tasks to do more of another if that’s what I need;**
- **if there’s a problem, tell me as well as your manager;**
- **contact me if you can’t come for any reason;**
- **if there is something you can’t do, help me to report it to someone who can;**
- **but be positive - “can do” not “can’t do”;**
- **listen to me;**
- **but please do make suggestions about how you think things could be done differently or better;**
- **check and tell me if I’m running out of something that you need to use;**
- **don’t talk about me to other people - and don’t tell me about your other clients;**
- **don’t see home care as doing me a favour - it’s your work;**
- **and do remember, although it’s your workplace it’s also my home;**
- **so please, treat me as a person not as something to be cleaned and managed.**

